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E-voice in the digitalised workplace. Insights from an alternative organisation

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Abstract

Digitalisation permeates all aspects of organizational life, especially the ways we communicate with each other. Drawing on a case study of an alternative organisation—the German collective Premium, which is almost entirely digitally organised—we seek to explore contextual factors that facilitate or hinder the expression of electronic voice (e-voice). Based on 20 semi-structured interviews with different members of the collective, we identified various contextual facilitators and barriers to e-voice expression: Collective belief in the value of diverse voices, cautious online and complementary face-to-face communication facilitate e-voice, while less formalised structures, power and knowledge asymmetries, and information overload hinder it. These findings demonstrate that despite an alternative organisation's firm intention and self-reflective efforts to create an inclusive and participatory digital space, tensions arise. Further, our study contributes to employee voice theorising by outlining contextual factors that are specifically relevant to e-voice practices.

KEYWORDS
alternative organisation, collective, digitalisation, e-voice, electronic voice, employee voice

Abbreviations: e-voice, electronic voice; HR, human resource.

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Practitioner notes

What is currently known?

- Being able to voice concerns and ideas has a positive impact on employees and the success of the company.
- Digital tools such as social media are important channels through which employee voice is expressed.
- The conditions under which electronic voice (e-voice) is facilitated or hindered are unclear.

What this paper adds?

- Identification of facilitators and barriers to e-voice.
- Collective belief in the value of diverse voices, cautious-online, and complementary face-to-face communication facilitate e-voice.
- Less formalised structures, power and knowledge asymmetries, and information overload hinder e-voice.
- Empirical insights from a unique case study.

The implications for practitioners:

- Train your employees to be cautious, self-reflective, and deliberate in their online communications.
- In highly digitalised work environments, implement practices that ensure opportunities for complementary face-to-face communication and building personal relationships.
- Assign roles and responsibilities to strengthen accountability and ensure that electronic voices are heard, and appropriate ideas are effectively put into practice.

1 | INTRODUCTION

Digitalisation is pervasive and is triggering fundamental changes in the way we work, communicate, and collaborate in organisations. For example, social media platforms that allow people to connect and share information are increasingly replacing or complementing face-to-face communication (Holland et al., 2019; Martin et al., 2015; Mennie, 2015) and teamwork is often organised virtually (Kremer & Janneck, 2013). The literature on employee voice shows that allowing employees to voice concerns, make suggestions and participate in decision-making has a positive impact not only on employee well-being and sense of inclusion (Bell et al., 2011), but also on organizational effectiveness (Nechanska et al., 2020) and success (Townsend et al., 2020). Therefore, it is critical for practitioners and scholars to better understand the conditions under which voices are expressed electronically through digital tools such as social media, chat rooms, or blogs. However, our knowledge of electronic voice (e-voice for short), is currently limited and researchers are calling for more studies to improve our understanding of the phenomenon (Balnave et al., 2014; Townsend et al., 2020). In addition, more studies of voice in different organizational settings are needed to better contextualise the phenomenon (Gilman et al., 2015). The goal of this paper is to address these deficits and explore facilitators and barriers to e-voice in the specific organizational context of an alternative organisation.

To investigate this question, we adopt an exploratory approach and use a single, in-depth case study design of a collective called Premium. Premium is a German beverage company formally owned by its founder, who democratically shares decision-making with a network of freelancers, all of whom together build the collective and collaboratively define its values and goals (Knoch, 2019). Alternative organisations, such as the Premium collective, are interesting fields of inquiry because they stand for principles such as democracy, participation, solidarity, and equality (Cheney, 2014; Parker et al., 2014; Reedy & Learmonth, 2009). The combination of these principles—assuming they are rigorously implemented—is intended to create an organizational space in which individuals are autonomous, free to express their opinions, and participate in decision-making (Maeckelbergh, 2014). In addition, Rothschild (2016) particularly emphasises the relevance of the Internet for those alternatives to bureaucratic forms of organisation,

which she refers to as 'Democracy 2.0', as for example, 'all relevant information and relationships be shared with the group at hand' (p. 10). Therefore, alternative organisations, with their emphasis on participation and electronic communication, provide a particularly rich research context in which to study e-voice.

Theoretically, our research efforts draw on the literature on employee voice with a particular focus on deciphering the organizational contextual factors that contribute to voice expression. We aim to contribute to the literature on employee voice by explaining the specific conditions under which e-voice occurs—presenting opportunities, but also drawbacks in a highly participatory and digitalised environment.

2 | EMPLOYEE VOICE IN CONTEXT

Employee voice 'describes how employees concerns, express, and advance interests, solve problems, and contribute to and participate in workplace decision-making' (Pyman et al., 2006, p. 543). Scholars conceptualise various voice schemes such as depth (the extent of employee influence), the scope of issues addressed, the level at which decisions are made, and the form, such as direct or indirect voice (Nechanska et al., 2020; Wilkinson et al., 2014). In this study, we focus on direct voice, that is, mechanisms that enable individual involvement and participation, rather than indirect voice, that is, collective employee representation through union and non-union structures, such as advisory committees or works councils (Marchington, 2008).

There is a large body of literature that addresses the contextual factors that influence direct voice and identifies ways in which a more or less conductive environment for employee voice can be created—including voices that challenge the status quo and therewith make an important contribution to organizational success (Klaas et al., 2012; Martin et al., 2015; Morrison, 2011). These contextual factors can be broadly divided into structural and cultural aspects (cf. Morrison, 2011).

Structural aspects refer to the type of organisation, hierarchy, and power. Less hierarchical structures such as teams without formal authority over each other (Ohana & Stinglhamber, 2019) and small or self-managed groups (LePine & Van Dyne, 1998; Ramchandani & Singh, 2020) facilitate voice. In addition, Wood and Fenton-O'Creevy (2005) emphasise the importance of employees having access to relevant information, the opportunity for consultation, and shared decision-making in order to raise their voices. In contrast, in organisations with highly centralised decision-making processes, upward feedback is often unwelcome and therefore leads to employee silence (Morrison & Milliken, 2000). Similarly, in organisations where there is a strong imbalance of power between employees and management and where there are no structures in place to enable voice to be exercised, or where voices are not heard or are ignored, the expression of voice is discouraged (Wilkinson et al., 2018).

Cultural aspects relate to workplace values and the nature of relationships. For instance, open and supportive work relationships are important (Ramchandani & Singh, 2020), especially with supervisors (Kwon et al., 2016; Milliken et al., 2003), not least because they help to create a collective belief in the safety and efficacy of speaking up (Morrison, 2011). Furthermore, in cultures with high levels of organizational trust, voicing problems and related needs is encouraged (Ramchandani & Singh, 2020), whereas in anonymous organizational settings and low levels of confidentiality, voicing one's opinion is discouraged (Almeida et al., 2020). This may also be related to cultural values such as power distance, as employees with high power distance values are more likely not to voice their concerns (Kwon et al., 2016).

2.1 | E-voice in the digital age

Digitalisation of workplaces has changed how people interact and communicate with each other (Holland et al., 2019; Martin et al., 2015; Mennie, 2015) and therefore, need to be considered when examining employee voice. New forms and channels of employee voice emerge through electronic tools such as social media, which Madsen (2017) defines

as a 'user-friendly and visible web-based communication arena inside an organisation in which co-workers and managers can communicate, interact, connect, and make sense of their work and organizational life' (p. 3). E-voice describes how employees raise issues, contribute solutions, and participate in decision-making through such electronic communication tools, which include not only social media, but also other channels such as chat rooms, email, or online surveys (cf. Greer, 2002). To date, however, research on e-voice is still in its infancy; in particular more critical perspectives that not only highlight the benefits of new technologies, but also scrutinise the downsides, are rare (Balnave et al., 2014).

Indeed, previous studies show that digital tools can improve employee engagement in decision-making processes and open up the potential for more e-voices, for example, through lower costs of reproducing and disseminating information (DiMaggio et al., 2001), easier and immediate access, and sometimes anonymous participation (Balnave et al., 2014; Holland et al., 2019; Klaas et al., 2012; Martin et al., 2015). Furthermore, the use of social media invites people to act out one's 'desire to share about one-self' (Kairam et al., 2012, p. 1070). Employees can showcase their knowledge, experiences, and emotions to gain appreciation, a sense of belonging, and visibility. However, digital tools clearly have drawbacks and individuals' ability to use these technologies varies. Societies face a digital divide determined by people's access to technology, the extent and quality of their use, and their technical abilities (DiMaggio et al., 2001, 2004; Warschauer, 2003). This can lead to social injustice, unequal distribution of power, privacy, and security concerns (Afzalan & Muller, 2018).

2.2 | Voice in the context of alternative organisations

The notion 'alternative organisation' is often used as an umbrella term covering various kinds of organisations, such as collectives, worker or consumer co-operatives, community initiatives, or social movements. Despite varying purposes, these organisations are united in their goal to organise 'capitalism in a more humane way, with greater attention to social, economic, and environmental sustainability of organizations[, not fitting] in the traditional corporate, for-profit model' (Barin Cruz et al., 2017, p. 322f., see also Webb & Chenney, 2014). To further define the alternative organisation, Cheney (2014) elaborated five principles (see also Reedy & Learmonth, 2009): (1) autonomy, (2) equality/equity, (3) participation and democracy, (4) solidarity and connection, and (5) responsibility for implementing policies and practices consistent with these values. In addition, Parker et al. (2014) emphasise the need to take responsibility for the future and minimise negative impacts on the external environment.

In their effort to implement and bring these principles to life, alternative organisations aim to create a space where all individuals are seen as equals, are free to express their opinions, and are given the opportunity to participate in decision-making. Hence, the concept of voice is inextricably linked to the values underlying alternative organisations. However, instead of the concept of employee voice, the literature on alternative organisations seems to more often use other but related concepts, such as participation, engagement, involvement, and empowerment (Mowbray et al., 2015; Wilkinson & Fay, 2011). For instance, Ramchandani and Singh (2020) provide a conceptual framework for employee-centred organisations, in which they highlight the drivers and consequences of employee engagement, empowerment, and enablement. Furthermore, in their study of a consumer co-operative, Barros and Michaud (2020) 'highlight how social media can offer a new space for debates, dissensus, and critical deconstruction' (p. 578); members not physically present were enabled to e-voice their opinions through the use of blogs and social platforms. In contrast, Agarwal et al. (2014), in their study on grassroots organising in the digital age, also point to the downsides of using social media, noting that users tend to communicate face-to-face, experiencing bonds of trust, rather than using the tools available.

In any case, researchers have argued that alternative organisations cannot be idealised per se (see also Cheney, 2014). In the absence of formal hierarchies in alternative organisations, certain individuals may informally set themselves apart depending on their capacity, resources, and incentives (Ansell & Gash, 2007), thus promoting,

or at least not preventing, power imbalances. Similarly, in Long's (1981) study of employee participation in ownership and decision-making, little desires for worker participation and influence were found at any level of decision-making.

3 | METHODS

We deemed a single-case study design appropriate because it allowed us to examine the phenomenon under study holistically and in-depth in its real-world context using multiple data sources (Piekkari & Welch, 2017). We adopted an interpretive, social constructivist perspective, that is, we searched for the meanings that study participants attach to their subjective social reality (Arino et al., 2016) and explored the facilitators and barriers to e-voice as perceived by Premium's members in the specific organizational context of a collective. Premium was chosen as a case for two reasons: First, the means of communication are almost entirely digital and therefore provide a rich environment for the study of electronic voice. Second, the organizational forms here are more participatory than in conventional organisations, which raises the question of whether this also implies more promising organizational conditions for the expression of e-voice.

3.1 | The case: Premium collective

Hirschman (1970) distinguishes between customers' voice and exit, by referring to voicing concerns or exiting by not buying or consuming the product. Interestingly, this mirrors what happened to the founder of Premium in 1999: He was disappointed because the taste of his favourite coke was changed, and he did not have the opportunity to have a say and voice his dissatisfaction. His reaction was not only exit by no longer consuming the product, but also by starting a new beverage brand. He founded the collective Premium in 2001 in Germany. Formally, he owns the brand and bears the business risk, but he equally collaborates with freelancers, who all work together to build the collective and define its values and goals. Members of the collective want to manage things differently and better than typical business organisations. In particular, Premium aims to demonstrate that moral and business motives do not contradict each other but can be integrated by focussing equally on the triad of ecological, economic, and social principles (Knoch, 2019). Since late 2004, the collective has been self-sustaining but does not seek to maximise profits. For instance, due to ecological reasons their products are only distributed in Germany, Austria, and Switzerland. At the same time, they are transparent about their organising model to allow organisations in other countries to imitate it.

Furthermore, Premium's members—including the founder—envision a collective where all stakeholders have an equal say, whether they are in sales, accounting, marketing, retailing, bottling, or simply consuming the product. In 2019, this included 1700 business partners and about 10,000 consumers (Edinger-Schons et al., 2019; Knoch, 2019). All stakeholders are treated fairly, this involves, for example, a decent equal pay for working members (including the founder), an adequate payment for orders, or avoiding unnecessary costs for customers (Edinger-Schons et al., 2019; Knoch, 2019).

The collective is managed by all interested members. The core management group is the so-called organising team, which consists of about 9–12 people, including the founder. They do tasks like accounting, sales, marketing, public relations, communication, and managing (regional) areas. About 30–50 members work as speakers meaning they are responsible for the customer service in a particular city or geographic area. The first contacts in the collective for these speakers are the regional managers, who are responsible for a broader region. Another group takes on supra-regional work tasks such as IT, communication, presentations, workshops, and (special) projects. Finally, 'production, logistics, and retail are done by independent professionals as regular contractors (with the right to participate in decision-making on an equal footing)' (Premium, 2022, February 2).

Premium lacks formal HR structures, that is, they do not have systematic information about their members, nor recruitment, or performance appraisal processes. They work without fixed positions and free choices of place, time, and scope of work without providing offices (Knoch, 2019). Because of this decentralisation, Premium is a thoroughly digitalised workplace, meaning that most communication and decision-making takes place online via the 'Board'. This is an internal digital communication channel in the form of a forum with currently about 150 members, to which access is granted after an individual request by email (Knoch, 2019).

The most striking characteristic of Premium is its non-hierarchical 'consensus democracy', that is, all members can participate equally in the decision-making process in the Board by joining a discussion, suggesting a resolution proposal, and agreeing to it or voicing a veto (Premium, 2021, July 4). Hence, Premium can be characterised as an alternative organisation in the sense that its value statements are consistent with the principles described in the literature, such as autonomy, participation, solidarity, and responsibility for the social and natural environment around them. Participants not only strive to implement and live these values within this organisation but are also on a mission to further 'spread a fair, ecological, and socially sustainable business model of high-quality' (Premium, 2021, July 4).

For its particular form of organisation, Premium is receiving attention from the scientific community. As part of their mission to spread their business model, Premium's members willingly share insights into their organizational life and regularly participate in studies, for example, on conflict management (Husemann et al., 2015), sustainability and growth critique (Pohler, 2019), or market entry strategies (Ladstaetter-Fussenegger & Luedicke, 2013). A prominent example that is particularly relevant to this study, is an investigation by Luedicke et al. (2017) who examine 'the practices and outcomes of radically open strategising' (p. 2). They show how Premium's members cope with arising challenges such as information asymmetries and overload, and power asymmetries by bypassing the open principles. The authors identify a 'selective use of [less] open [and partially contradictory] strategising opportunities' (p. 2), such as authoritative decision-making, in which 'one person decides on an issue' (p. 40), rather than following the consensus principle.

3.2 | Data collection

Data sources include a survey and interviews. To understand Premium's organizational context, we first emailed an online questionnaire to members. The main objective was to get an overview of demographic characteristics, type of involvement, work responsibilities, and influence on decision-making. Within a month, 36% (54) of the members voluntarily participated in the survey. Since Premium does not systematically collect such information, this was a necessary first step in obtaining an overview of the case, developing our interview guide, and selecting interview participants.

In a second step, we conducted 20 in-depth, semi-structured interviews with different members of the collective, taking care of a balanced gender participation. In Table 1, we indicate the main role of each interviewee in the organisation and specify a code that we use as a reference for interviewee quotes in the findings section. Some interviewees were recruited through a post in the online forum, others through emails, or a snowballing process. The interviews lasted on average about 80 min and were conducted by telephone in German. Each interview partner was assured of data protection and confidentiality.

The interview guide was used flexibly, it included sections on the personal background of the interviewees, on (digital) forms of communication, human resource practices, for example, recruitment, development, work organisation, leadership, and decision-making, as well as on practices and perceptions around inclusion (partly inspired by Danowitz et al., 2012).

TABLE 1 Overview of interview participants main role(s)

Interviewee code	Interviewee's main role(s)
I01	Organising team member
I02	Organising team member
I03	Organising team member
I04	Organising team member
I05	Organising team member
I06	Organising team member
I07	Speaker
I08	Speaker, supra-regional tasks
I09	Organising team member
I10	Speaker, reseller
I11	Speaker
I12	Regional manager, speaker
I13	Supra-regional tasks, former organising team member
I14	Consumer, former speaker
I15	Consumer, former supra-regional tasks
I16	Management of supra-regional tasks
I17	Management of supra-regional tasks
I18	Consumer
I19	Consumer
I20	Consumer

3.3 | Data analysis

To facilitate a comprehensive and in-depth analysis while providing a rigorous, structured, and transparent account of our data, we use the so-called Gioia methodology (Gioia et al., 2012), which is rooted in the grounded theory tradition (Glaser & Strauss, 1967; Lincoln & Guba, 1985; Strauss & Corbin, 1998). All interviews were recorded, transcribed, and imported into NVivo software for coding. First, we began the analysis with open coding (Strauss & Corbin, 1998) with the goal of closely following the interviewees' wording to appropriately capture their subjective perceptions and descriptions of situations in which they were (un)able to express their voice, resulting in 270 first-order codes (Strauss & Corbin, 1998). Second, inspired by theoretical concepts, for example, shared beliefs about voice (cf. Morrison, 2011; Morrison et al., 2011), open and supportive work relations (Milliken et al., 2003; Ramchandani & Singh, 2020), or information overload (cf. Luedicke et al., 2017), we discovered similarities between the codes through axial coding and grouped them into six more abstract second-order themes (Strauss & Corbin, 1998). Finally, we categorised the second-order themes into two aggregate dimensions that distinguish between contextual facilitators and barriers to e-voice (see Figure 1).

4 | FINDINGS

In this section, we present and explain the identified second-order themes along our aggregate dimensions: (1) contextual facilitators and (2) contextual barriers to e-voice.

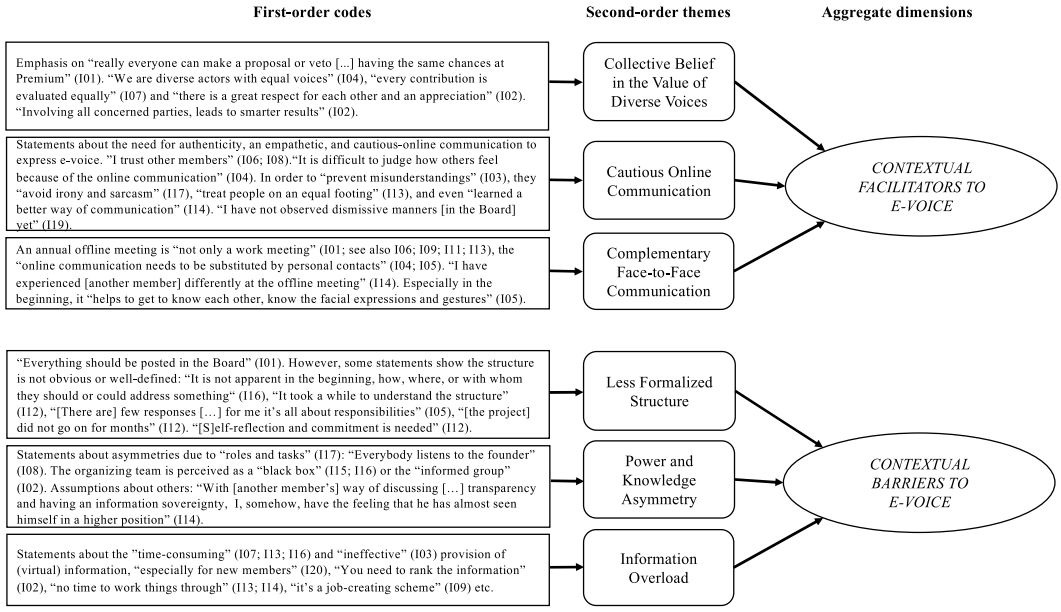

FIGURE 1 Data structure

4.1 | Contextual facilitators to e-voice

4.1.1 | Collective belief in the value of diverse voices

Premium members value voices of all concerned parties as a 'competitive advantage' (I02). 'Swarm knowledge' (I06) or 'collective intelligence' (I06) is seen as crucial for decision-making. In that sense, Premium counts on the support of all its different members to find the best solution:

> I think that individuals gain power through consensus democracy. [...] The most important thing – and what people need to learn – is to apply it generously. However, saying I trust you or I see things differently is not in itself a bad thing. If it's important to you, do it. This generosity is underestimated; it's not about imposing your individual opinion, [...] but rather about finding [collectively] the best, most intelligent, or most thoughtful solution. But also, openness, allowing everyone to voice their opinion is not only okay, it's good. [...] And finally the responsibility [...] if I know something important, I have to participate (I04).

Furthermore, critical voices are heard and considered fruitful, even if this is sometimes disappointing for the individual who made a proposal in the first place, as the following quote shows:

> I made a suggestion, [someone voiced] a veto [...] I was kind of demotivated to go on. I did not pursue it further, but I realized that it was plausible and that further steps were needed before certain ideas could actually become a resolution proposal [...] We actually discuss why there is a veto in the first place, what does not fit there and what perspective is brought in, and to what extent it is justified (I12).

Moreover, members are very accepting and tolerant of people's differences, diverse perspectives, and possible conflicts. One interviewee points out:

> You can be a tiring or annoying person, have a different opinion, be sick, do a bad job, make mistakes or all at the same time. You can criticise the founder, have a controversy with him, but all this is not a problem (I02).

It appears that the collective shares the belief that the voices of different members are valuable and based on tolerance and trust. The virtual decision-making culture is perceived as something special that offers many opportunities to raise one's voice.

4.1.2 | Cautious online communication

Since most of the communication at Premium takes place online, members are very mindful when it comes to their use of language. One respondent admitted to being impressed by the 'quality of the discussions' (I08). Another said one can 'learn a lot about communication' (I14). Communication is perceived as 'very mindful, respectful, thoughtful, approachable, engaging, [and] inclusive' (I04). To avoid misunderstandings through virtual and written communication, participants are empathetic and careful:

> I try to avoid irony and sarcasm because I know it's very difficult to convey and take back online. I try to write very neutrally (I17).

Voicing needs and acknowledging them is seen as less problematic in Premium (I01) because it is handled proactively, for example, (virtual) meetings always start with a sensitivity-round to express members' feelings and needs (I02m; I03).

> How are the people? What's going on privately that they want to talk about? How is their health? How is everyone doing? [...] We want to acknowledge that when people open up (I02).

Indeed, this is also related to Premium's understanding of leadership, namely, to provide direction and create a safe space, as one of the organising team members points out:

> What I have to do is to create a big safe space where everybody who is somehow involved with us feels safe to move and develop freely. And so can speak their honest mind. (I02).

These quotes support the perception of most interviewees that the climate is indeed rather peaceful (I01) and conducive to e-voice.

4.1.3 | Complementary face-to-face communication

While virtual communication is the norm, it became clear throughout the interview process that face-to-face communication is sparse but an important complement. Premium organizes an annual 'offline meeting' for all members that is 'not just a work meeting' (I01), 'it has a bit of a happening character' (I17) where they get to know each other (I09; I11). 'Meeting in person at some point helps to understand [each other's online communication] better. That's why offline meetings are important' (I11).

Some members of the collective may prefer to work mostly alone (I02; I11), while others see a 'deficit in not having social contacts [...] to build a collegial relationship' (I08). This quote illustrates the importance of additional face-to-face contacts:

> Maybe I am too sensitive, but if I did not know a person and only communicated with them by mail, especially at the beginning, [...] I would not have felt understood. [...] How people react to different topics, I think I can only judge if I know the people and so I think it only works well if I have the opportunity to get to know the people beforehand (I05).

Furthermore, it seems to be helpful to have personal contacts to address certain issues such as individual interests or needs (I10). However, some participants also prefer to share new ideas with their peer group before voicing them in the collective:

> I would do that first with the orga[nizing] team to check it out and then if they say, yeah, that's interesting, ask in the Board or get more opinions or something, I will do that. But the first impulse, I think I would always discuss it first with the people I already know (I05).

It becomes evident that many members of Premium need complementary face-to-face communication to facilitate e-voice.

4.2 | Contextual barriers to e-voice

4.2.1 | Less formalised structure

The collective is aware that because of its virtual and decentralised structure that is little formalised, its members risk working in solitude (I06). Since Premium has neither an office nor regular working hours, it is sometimes difficult to reach someone quickly (I02) because as one interviewee states: 'I work from home or wherever I want' (I01). The collective lacks binding structures, sometimes resulting in non-decisions (I16), unfinished tasks (I12) or longer project durations (I16). Waiting for online responses, answers or feedback is demotivating and hindering, as one respondent describes as follows:

> No, it's not quite that simple at Premium. I have raised [an issue] first, suggested [a solution] and offered to do that. But then things kept fizzling out, for one reason or another. There were concerns. And that was pretty exhausting, just the fact that I first brought [my project] up almost four years ago [...] and I finally completed it in June. So, it had a project duration of over three and a half years (I16).

Another interviewee underlines, '[There] are only a few responses [...] for me it's about responsibility [...] I feel like only five to ten people kind of participate in the forum' (I05). Premium's principles of autonomy and absence of hierarchy allow members to speak up or remain silent in discussions whenever they want, that is, there are no formal mechanisms obliging people to contribute and use the information in the Board for their work tasks and related decisions. Therefore, less formalised structures shift much of the responsibility to the individual and limit e-voices addressed to the collective, as problems are usually solved single-handedly.

4.2.2 | Power and knowledge asymmetry

Premium members value equality among themselves. However, most interviewees point to informal hierarchies that arise from the way Premium is organised. First, according to one interviewee, a 'big problem is the perceived separation between the organising team and the rest of the collective' (I03). Their work is sometimes perceived as 'non-transparent and anti-collective […] if shared at all' (I14).

Secondly, information, consultation and collective decision-making are supposed to take place virtually, where they are visible and accessible to all members. Therefore, 'everything in the Board is supposed to be made public' (I06). However, this is not done consistently, leading to a 'knowledge hierarchy' (I13; I11), as the following quote shows: 'The collective partly does not know what decisions are made at the top and therefore cannot say: "We want to have a say in this decision"' (I15).

Third, the founder is the central figure of the collective, 'he holds the strings' (I16) and can unintentionally silence other participants. One interviewee explains his role:

> Even if he does not want to, he plays a central role. And he's the one who is seen a lot [inside and] outside the collective, and he has this alpha role because of his charisma and his demeanour. And so, a lot of people look to him and say, okay, I'll do it, if he thinks it's good, I think it's good. I can imagine […] some people feel like they are being overshadowed (I07).

According to some interviewees, the founder's voice has more power than others, not based on formal power structures, but as informal power that has grown over time, as the following quote shows:

> His voice is often of great importance, because he is the founder and the one who really bases his whole life on it. […] He's particularly affected by everything, of course, and so if he were to say, 'I definitely do not want it one way or the other,' that would shorten the discussions (I17).

These quotes suggest that despite the principle of equal dignity, there are power and knowledge asymmetries within the collective, that unintentionally give more weight to the e-voices of some members and silence others.

4.2.3 | Information overload

New members with 'previous damage from other organisations' (I02) need some time to get used to this non-hierarchical, participatory decision-making style. Some interviewees address related disadvantages of autonomy: 'If everyone can do what they want, it is often time-consuming to make appointments' (I01). One interviewee is aware of the costs that can be associated with democratic decision-making, and expressed concerns about efficiency in achieving business goals:

> But sometimes […] lay people express their opinions [on certain subjects], which I, as an expert [in this field], find impossible. [And the coordination loops] are a hindrance. […] It costs me twice as much time, twice as much energy, and that's effectively money. […] Consensus decisions cost a bunch of money and a bunch of time […] but still it worked for 18 years (I03).

Moreover, interviewees stress that it is very time-consuming to read all the Board discussions (I14), and therefore members report some fatigue in expressing their voices electronically because they lack the time to deal with the details of each discussion and/or explain their own views (I13; I17).

Similarly, others feel the urge to prioritise their work tasks and therefore do not have time to engage in time-consuming Board discussions, as the following quote shows:

> I rarely consulted the Board. I found it difficult because I had a lot of tasks. I felt that I never get my work done and that I lack the time to discuss things in the Board (I13).

Hence, information overload and time-consuming participation processes in the digital sphere may reduce Premium members' readiness for e-voice.

5 | DISCUSSION

In this study, we examined contextual factors that facilitate or hinder e-voice in the specific context of a highly digitalised alternative organisation. Echoing others (Ansell & Gash, 2007; Cheney, 2014), we show that well-meant practices in alternative organisations not always turn out as intended. While various aspects such as collective belief in the value of diverse voices or the very careful and thoughtful online communication style of members of the collective do indeed facilitate the expression of e-voice, barriers such as less formalised procedures or power and knowledge asymmetries coexist and can limit people's ability and willingness to voice their concerns via digital tools. How these tensions coexist is illustrated in Figure 2. In what follows, we discuss the theoretical and practical implications of our study, as well as its limitations and future research opportunities.

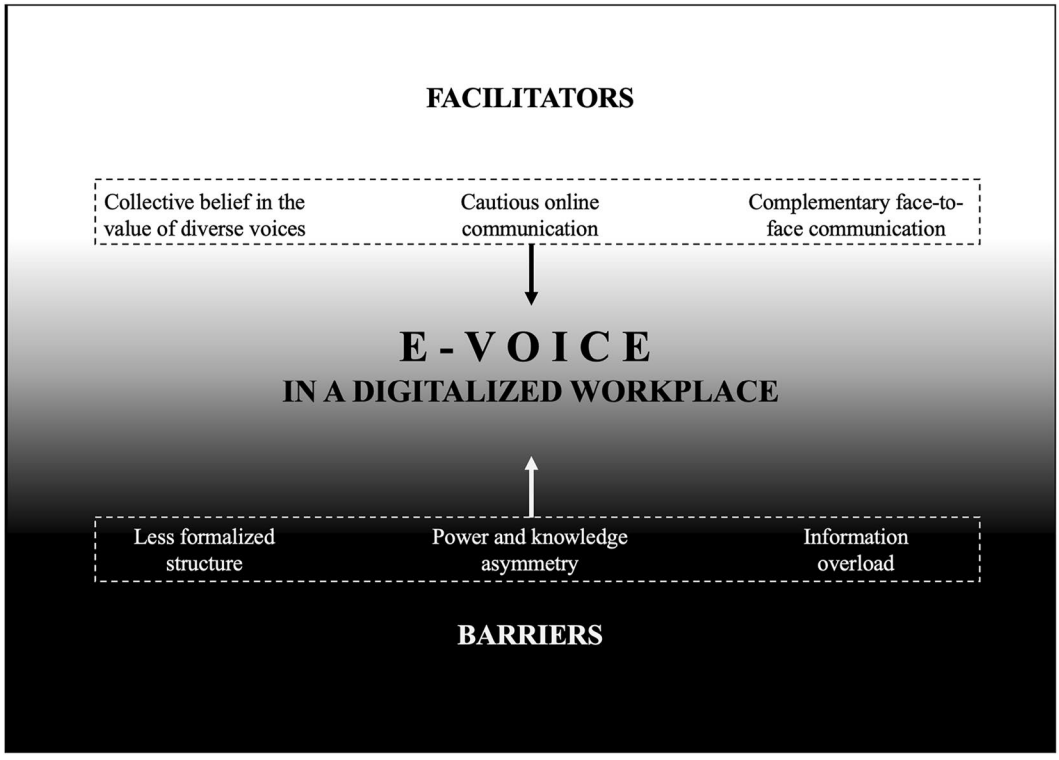

FIGURE 2 Contextual facilitators and barriers to e-voice in a digitalised workplace

5.1 | Theoretical implications

The findings of the study show that some of the contextual factors identified in the broader literature on employee voice are also relevant in a digital context, while some require expansion and/or specification. For example, researchers have highlighted that shared beliefs about voice are important, for example, about the safety of voice and its effectiveness (Morrison, 2011). Following and extending this line of thought (cf. Morrison et al., 2011), our findings show that the collective belief in the value of diverse voices is indeed an important prerequisite for the expression of e-voice. The Premium Board is the main electronic communication channel through which members have the opportunity to participate in discussions and make suggestions, and our results suggest that an authentic appreciation of different voices, including critical voices, is key to encouraging participation.

Moreover, we show the crucial role of cautious online communication for e-voice. While the voice literature broadly suggests that fostering an open and supportive working relationship is an important factor in establishing voice (Ramchandani & Singh, 2020), we show in this study how this translates to the digital sphere. Premium members demonstrate a high degree of critical self-reflection about their own actions and are aware that virtual communication, in part with people they may not know personally, requires particularly sensitive and compassionate online interaction. At the same time, our findings extend previous research on alternative organisations that emphasise the importance of face-to-face communication (cf. Agarwal et al., 2014) by showing that additional personal contact and relationship building beyond the digital space are crucial to triggering the expression of e-voice. This is also consistent with previous studies in the employee voice literature that suggest that low levels of confidentiality discourage voice (Almeida et al., 2020), but contrasts with the emerging e-voice literature that points to the opportunities for more open, yet provocative, expression of voice in an anonymous online environment (Martin et al., 2015).

Regarding the barriers to e-voice identified in this study, we found that, for example, less formalised structures that shift a lot of responsibility to individuals and do not hold people accountable can limit the motivation to engage in discussions via digital tools. This lack of accountability and standardized procedures can also lead to ignored or unread e-voices in the Board, resulting in frustrating, slow, and time-consuming coordination processes. This echoes the findings of Wilkinson et al. (2018), who highlight that voices sometimes go unheard, not because of deliberate suppression of voices, but because of 'institutional noise' (p. 714). Our findings suggest that such institutional noise can arise from a lack of formalisation, but also from information overload, that is, an unmanageable amount of information produced during the digital Board decision-making process. Previous research on e-voice suggests that actual participation in decision-making is enhanced by digital platforms, as they allow easier, immediate access to information and low costs (Balnave et al., 2014; Holland et al., 2019; Klaas et al., 2012; Martin et al., 2015), but our study points out the drawbacks of this phenomenon.

Our findings on e-voice barriers are also consistent with the literature on alternative organisations, which shows that informal hierarchies based on power and knowledge asymmetries persist even in alternative organisations and that certain actors, such as the founder, may informally demarcate themselves depending on their capacities and resources (Ansell & Gash, 2007). However, in the case of Premium, Luedicke et al. (2017) suggest that members actually accept the central role of the founder due to his 'self-sacrificing' (p. 23) behaviour and his (informal) power that has grown over time. Nevertheless, the other side of the coin is a lack of legitimacy for the voices of less powerful members (cf. Wilkinson et al., 2018), which limits their opportunities to be heard.

Finally, looking beyond the boundaries of the collective, the risk of reproducing inequalities in the digital sphere is high given the different resources people are endowed with (e.g., digital skills, equipment, support) and the background they are socialised in (e.g., migration background, gender, age) (DiMaggio et al., 2001, 2004). This has important implications for digitalised workplaces as the case of Premium highlights that many people may not be equipped with the necessary resources to access and work within such organisations.

5.2 | Practical implications

Our study has several implications for HR managers and decision makers who want to foster an inclusive culture that allows employees to voice their concerns and ideas through digital tools. First, Premium's case demonstrates the importance of communicating carefully and thoughtfully, especially in an online environment where, for example, it would be advisable not use sarcasm because it can be easily misunderstood. Such a sensitive communication culture is rather typical of alternative organisations (e.g., Ansell & Gash, 2007; Parker et al., 2014) and could inspire other organisations to train their employees in self-reflective and constructive online communication. Second, we are currently witnessing the digitalisation of work being spurred at an unprecedented pace due to the Covid 19 pandemic, which is driving many workers around the world to work from home (DeSilver, 2020). Organisations need to respond to these changes and harness their potential, but also recognise and counteract the associated disadvantages. Our study suggests that digital communication alone is deficient, as people need additional face-to-face contact with their colleagues to build bonds of trust, discuss ideas and feel confident to contribute their thoughts in the digital sphere. Therefore, HR managers could organise social events or mentoring programs to ensure relationship building within and outside the digital space. Finally, organisations facing a lot of institutional noise, like the collective considered here, could counteract this by assigning roles and responsibilities more explicitly to improve accountability and ensure that e-voices are heard, and ideas are effectively put into practice.

5.2.1 | Limitations and future research

The uniqueness of our case study offers interesting insights into e-voice in alternative organisations but may raise questions about generalisability as Cheney (2014) highlights that some forms of alternative organisations are more context or domain specific. The landscape of alternative organisations is diverse and may include cooperatives in general or worker-owned, social movements, and other forms with various manifestations of the five principles described in the literature (Cheney, 2014; Reedy & Learmonth, 2009). However, we argue for the transferability of our findings to structurally equivalent contexts (Corley & Gioia, 2004). This may apply not only to alternative organisations, but also to more innovative firms that rely on participatory decision-making architectures and digital technologies. Investigating how different organizational characteristics or values affect the scope and depth of e-voice behaviour could be a fruitful future line of research, especially with a focus on currently under-researched e-voice mechanisms.

Furthermore, many of the previous studies on e-voice emphasise the benefits of digitalisation (Balnave et al., 2014), but more critical studies are needed to understand the associated drawbacks. The contextual factors identified in this study could be used as a starting point for larger survey studies to test, extend and refine. Another potential avenue for future research could involve the voices of marginalised groups (e.g., gender, race, or sexuality) that are often 'ignored, suppressed, or missing' (Syed, 2014). Digital tools may reinforce or mitigate such marginalisation; for example, dismissive tendencies in anonymous virtual communication may be avoided if gender is obfuscated.

6 | CONCLUSION

This study addresses contextual facilitators and barriers to e-voice in the digitalised workplace of a German collective. We show that a collective belief in the value of diverse voices is particularly important in the digital sphere, that awareness and self-reflection are necessary for careful online communication, and that complementary face-to-face communication facilitates the expression of e-voice. At the same time, we propose that e-voices are inhibited by institutional noise that arises from less formalised work structures and information overload as well as by (unintentional) informal hierarchies based on power and knowledge asymmetries. Overall, this study contributes to employee voice

theory and practice by providing a better understanding of the conditions under which e-voicing occurs, but also highlights the tensions that arise when well-intentioned participatory decision-making structures are implemented in a digital sphere.

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CONFLICT OF INTEREST

The authors declare that they have no conflict of interest.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are not publicly available due to anonymity reasons but are available from the corresponding author on reasonable request and with permission of Premium.

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SPECIAL ISSUE ARTICLE

Creativity development and Mode 2 theory development: Event system and experiential learning perspectives

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Abstract

Literature on academic-stakeholder collaboration in the context of HRM is scarce and highlights the challenges linking theory to practice. Drawing on Mode 2 research, we theorise how a structured intervention enables the generation of theoretical insights concerning the development of employee creativity knowledge, skills, and attitudes (KSAs). Utilising event system theory, we reveal how the novelty, criticality, and disruption of a structured intervention fuel an experiential learning process. This process facilitates the development of important individual and team-based creativity KSAs and is sustained through a learning mindset. We develop insights about theories-in-use, HRM theory development, and the micro processes involved in an academic-stakeholder collaboration including areas of potential tension. From a practice perspective, we highlight the value of structured interventions for creativity KSA development and a strategy to facilitate academic-stakeholder collaboration.

KEYWORDS
academic-stakeholder collaboration, creative problem-solving, event system theory, experiential learning process, structured intervention, theory development, theory-practice divide

Abbreviations: CPS, creative problem-solving; HR, Human resource; HRM, Human resource management; KSA, Knowledge, skills, and attitudes.

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Practitioner notes

What is currently known about the subject matter?

- Research highlights models and processes to undertake academic-stakeholder collaboration, yet few studies report the outcomes of these collaborations for theory development.
- Research highlights that organisation can use different types of interventions to develop creativity knowledge, skills, and attitudes (KSAs).
- Action research has emerged as a popular form of academic-stakeholder collaboration; however, few studies have focused on a structured intervention to develop theory.
- Research on the outcomes of academic-stakeholder collaboration in HRM is embryonic.

What the paper adds to this?

- The paper utilises event system theory to conceptualise the contribution of a structured intervention to the development of theory about creativity KSAs in organisations.
- The paper provides important insights concerning the micro processes of academic-stakeholder collaboration including areas of potential tension.
- We develop important insights about the role of learning mindset, individual and team-based concrete experiences, and the centrality of creativity artefacts and creative problem-solving techniques for the development of creativity KSAs.
- We develop insights about the role of theories-in-use in developing theory in HRM.

What are the implications for practitioners?

- Our findings highlight the value of structured interventions as events to activate cycles of experiential learning that lead to the development of creativity KSAs.
- Learning mindset emerges as an important individual characteristic that helps to sustain individual and team-based experiential learning processes, and which leads to creativity KSA outcomes.
- The development of creativity KSAs involves multiple individual and team-based experiential learning cycles in the workplace supported by a positive work environment.

1 | INTRODUCTION

Scholars highlight the benefits of Mode 2 research (Guerci et al., 2019), defined as research which is non-linear, transdisciplinary, and which involves co-production by stakeholders and academics (Swan et al., 2010), in the context of the HRM discipline. Yet, efforts to undertake this type of research in HRM are modest (Bleijenbergh et al., 2020; Chang & Chen, 2011) with various reasons suggested for the lack of progress. These reasons include that both HRM academics and stakeholders have different priorities (Sætre & Van de Ven, 2021), with scholars being less interested in practical knowledge (Leppäaho et al., 2021), and the notion that HR stakeholders are less willing to engage with researchers because they view the collaboration as a potential threat (Gill, 2018). Bartunek and Rynes (2014) suggest that another possible reason for the lack of progress is that too much emphasis has been given to the 'gap' and 'bridging the gap' rather than viewing the gap as being of fundamental importance to research and theorising. Such an approach, they argue, has as its central notion the idea that academic-stakeholder collaborations are essentially tensional and subject to paradox. Therefore, academic-stakeholder research should prioritise the surfacing of these tensions to advance theory building and the use of theories-in-use to generate important theoretical insights that are of value to stakeholders. Potential tensions that emerge include differences in logics, time dimensions, the communication of research findings, the motivations and priorities of academics and stakeholders, and what constitutes rigor

and relevance. This suggests that both academics and stakeholders should choose collaboration mechanisms that enable them to work, understanding these tensions (Bresnen & Burrell, 2013; Wickert et al., 2021).

HRM scholars have proposed different approaches that potentially can be used as a framework to explore these tensions. These approaches include action research as a strategy for collaboration (Bleijenbergh et al., 2020), phase-based frameworks (Guerci et al., 2019), and networks (Coughlan et al., 2021). Many of these suggestions have the potential to operate at the micro level and therefore illuminate these tensions, yet they are criticised for focusing too much on the gap (Bleijenbergh et al., 2020), and the generation of solutions. These approaches also potentially place the emphasis on the priorities of the organisation rather than the development of theory and focus on the elites in organisations ignoring powerless actors (Bresnen & Burrell, 2013; Swan et al., 2010). In this paper, we propose that structured interventions defined as a small-scale academic-led process, comprising pre-assessment of learning needs to address a specific organisational problem, the use of structured classroom-based activities, and the initiation of experiential learning processes, have the potential to anchor Mode 2 research in the day-to-day reality of organisational practice and facilitate the generation of theories-in-use which can contribute to the development of HRM theory. Structured interventions are narrower in scope than action learning projects and 'can target individuals, groups, or whole organisations, and aim to improve individual, group, and/or organisational outcomes… by promoting positive outcomes' (Thiele Schwarz et al., 2021: 415) while at the same time providing the potential to explore tensions in the context of academic-stakeholder collaborations.

We first investigate the use of a structured intervention focused on the development of employee creativity (Hirudayaraj & Matić, 2021) as a basis to develop HRM theory from stakeholders' theories-in-use about the experiential learning process that underpins the development of creativity knowledge, skills, and attitudes (KSAs), and second, we develop insights about the complexities of academic-stakeholder collaborations using a structured intervention approach. Employee creativity, which we define as the individual process of developing novel and useful ideas concerning processes, services, and procedures (Wang et al., 2018), is critical for organisations to foster innovation (Shipton et al., 2017) and can be developed under favourable organisational conditions (Han & Stieha, 2020), however, it is still not clear how the process of creativity development can be operationalised. To develop insights on both creativity and theory development, we utilise an event system perspective (Morgeson et al., 2015). This is a good fit theory in the case of our structured intervention because it captures context in theorising (Johns, 2018) and provides insights into the impact of interventions as events (Chen et al., 2021; Valgeirsdottir & Onarheim, 2017) on both the development of creativity KSAs and the generation of theory on academic-stakeholder collaborations. We theorise those structured interventions can be conceptualised as events because of their novelty, criticality, and disruption within an organisation. Structured interventions are novel because for employees they are unexpected and unusual in organisations (Morgeson et al., 2015); they are critical in that they focus on the development of creativity KSAs, something considered essential for day-to-day performance and a major strategic priority in organisations; and they are disruptive in that they require employees who participate in these interventions to change their approach to creativity and do things differently (Birdi, 2016). The notion of disruption is central to the idea of interventions and was emphasised by Argyris (1970) in his original conceptualisation of an intervention where he articulated its purpose as disrupting the status quo.

We rely on this theorising within the Mode 2 research perspective and conducted a structured intervention in four hospitality organisations. As part of this structured intervention, we utilised multiple types of data collection methods, such as structured pre- and post-workshop surveys, observations during the workshop, and post-workshop semi-structured interviews to ensure both method and source triangulation. The evidence generated allowed us to explore two research questions: (1) *What is the impact of structured interventions on the development of employee creativity KSAs and the nature of the experiential learning process?* (2) *What are the micro processes in structured interventions that contribute to both stakeholders' theories-in-use and HRM theory development?*

We make three important contributions to the literature. First, we contribute to the literature on employee creativity KSA development (Wang et al., 2018). Creativity is a critical part of job functions for employees in service organisations and there is significant scope to expand our knowledge concerning the types of interventions that

can accelerate the development of necessary KSAs. We specifically develop insights into the experiential learning processes involved in the development of creativity KSAs (Markowska & Wiklund, 2020). Second, we make an important contribution to understanding the dynamic micro processes inherent in a structured intervention for Mode 2 purposes. We do so by unpacking five complexities identified in our academic-stakeholder collaboration. Third, we illuminate how these micro processes aid to develop stakeholders' theories-in-use and subsequent HRM theory, and how this plays out in an organisational setting involving academics and stakeholders. In doing so, we advance insights on the interplay of stakeholders and academics in the context of structured interventions, the importance of considering different theoretical lenses, and the balancing of both academic and stakeholder perspectives.

2 | LITERATURE REVIEW

2.1 | Event system theory and academic-led structured interventions

Event system theory presents an important theoretical suggestion that structured interventions can be understood as events and the characteristics of these events impact employees' behaviour (Jiang et al., 2019; McFarland et al., 2020). The theory proposes key event strength characteristics, *novelty*, *criticality*, and *disruption*, impacting the way in which employees behave in an organisation (Morgeson et al., 2015). Event novelty emphasises the extent to which an event is different or departs from current or past ways of doing things. Novelty helps the event to stand out and elevates its potential to trigger change or processes of learning (Morgeson et al., 2015). For example, novelty may be concerned with something that is new to the organisation such as a process, practice, or system. Criticality as a characteristic of events is concerned with the extent or degree that the event is important to the organisation and that it is a strategic priority. For example, the survival of the organisation depends on doing something different or taking a different strategic path. Where an event is viewed as critical it will be perceived by an employee as both salient and requiring their attention. Disruption captures or reflects a discontinuity in the organisation and where something has changed. It essentially characterises a situation where things will have to be done differently and requires the abandonment or transformation of organisational routines to adjust and adapt (Morgeson et al., 2015). Disruption is typically conceptualised as a major disturbance in the environment such as COVID-19 or significant change in an organisation's customer base. We propose that the structured intervention that is the focus of this paper can be described using these three characteristics.

(1) *Novelty*. We conceptualise a structured intervention as novel to the extent that it is a high-profile way for an organisation to have employees engage with creativity as part of the routines of the organisation and make it a key component of their role. The very act of bringing in academics to the workplace and publicising the event and their involvement introduces novelty in that it is a departure from what was done previously. (2) *Criticality*. A structured intervention can be considered critical in the sense that the development of creativity is of strategic relevance for the competitiveness of an organisation (DeRue et al., 2012). Given the criticality of employee creativity KSAs to the development and delivery of novel customer solutions in the service sector, the intervention can have the effect of gaining the attention of employees through each organisation. (3) *Disruption*. The structured intervention can be considered disruptive in the sense that it requires employees to develop new KSA outcomes. These outcomes can be developed using learning methods such as brainstorming, synectics, morphological analysis, lateral thinking, theory of inventive problem solving, and creative problem-solving (CPS; for a review, see Birdi, 2016). They have the effect of taking employees out of their comfort zones, presenting them with a new reality and emphasizing that things will be different. The multiple cycles of experiential learning activated by structured interventions can fundamentally change creativity KSAs and 'develop an individual's capability to generate novel and potentially useful solutions to (often complex and ill-defined) problems' (Birdi, 2016: 298).

2.2 | Structured interventions as Mode 2 research

We argue that academic-led structured interventions meet the requirements of Mode 2 knowledge production. Gibbons et al. (1994) articulated that Mode 2 allows new knowledge production as a socially distributed system-based process and they highlighted five characteristics which are applicable to academic-led structured interventions. First, Mode 2 knowledge is generated through action and there is no division between the production of knowledge and its application. Second, Mode 2 knowledge is transdisciplinary and therefore it mobilises a variety of theories, models, and practical methodologies to address an organisational problem (Gibbons et al., 1994). Third, Mode 2 knowledge is viewed as reflexive where the researcher shows a particular sensitivity to the process of research and the dynamics of CPS in organisations (Gibbons et al., 1994). Fourth, Mode 2 research is heterogeneous and works with organisational diversity, involving different organisations, participants, and researchers (Guerci et al., 2019). Mode 2 researchers are accountable to the organisations participating in the intervention and their academic communities. Finally, Mode 2 research utilises a diverse range of controls to facilitate the implementation of the academic-stakeholder collaboration.

Applying these characteristics to structured interventions, Thiele Schwarz et al. (2021) first highlight that these interventions are centrally concerned with changing the way things are done in organisations, and to be effective, they require collaboration between stakeholders and researchers. Kristensen (2005) highlights that they produce new practices, surface theories-in-use, and illuminate differences. In terms of the second characteristic, structured interventions have drawn on acquisitive theories of development (Garavan et al., 2015), experiential learning theories (Kolb, 1984; Kolb & Kolb, 2011), and theories of creativity, in particular creative behaviours including divergent thinking (originality, fluency, elaboration, flexibility) and convergent thinking (Berg, 2016). They also incorporate practical techniques such as brainstorming and working through the stages of CPS: idea collection, idea generation, idea consolidation, idea evaluation and choice, and idea elaboration (Birdi, 2016). Third, they are sufficiently flexible and dynamic to engage with the unique context of each organisation, and fourth, they engage with different types of creativity problems and participants. For example, in our study, we worked with hotels that had different business goals, target markets, and participants who had varying levels of work experience and experience of CPS. Finally, structured interventions allow for a range of controls including engagement with real-life creativity issues, the use of collaborative processes to address tensions and challenges, the use of reflection, and the generation of workable KSA outcomes for organisations (Franco et al., 2020). We were also conscious of the time that it takes for the outcomes of the interventions to generate creativity KSAs.

3 | CHARACTERISTICS OF THE COLLABORATORS AND METHODOLOGY

3.1 | The background and organisations

Prior to designing and implementing the structured intervention, the collaboration involved working with the largest creativity society (*APA Division 10: Society for the Psychology of Aesthetics, Creativity, and the Arts*) to inquire into the content and setup for creativity structured interventions. The process of engagement with the four organisations led to the identification of a specific organisational problem around the development of creativity KSAs. The structured intervention was implemented within four hotels located in Northern Ireland: one being part of a large multinational chain and three being part of local hotel groups. Operating in an extremely volatile economy which frequently reports high turnover rates and skills shortages across firms and countries (Baum, 2019), hospitality businesses are often considered to be somewhat a laggard when it comes to innovative approaches (Martin-Rios & Ciobanu, 2019), and thus employee creativity presents an opportunity for industry innovation (Hon & Lui, 2016). The first organisation was part of a major international hotel chain that operated in a highly competitive market and presented both strategic and operational issues. The strategic issue concerned the need to develop greater competitiveness within their

market segment and the operational issue focused on the need to solve everyday challenges effectively and to bring fresh thinking to increase customer follow from the non-residential market segment. The second organisation experienced several operational problems that needed CPS. They had a particular issue with the use of hotel vouchers by employees and the need to manage revenue more effectively. The third hotel experienced business issues around competing successfully in the hospitality segment in which they operated. They sought to capitalise on trends in the hospitality marketplace including the flow of tourists from the Chinese market and the requirement to offer new services to existing market segments. The fourth organisation also experienced competitive issues and needed to diversify existing offerings and develop new campaigns. They also experienced operational problems around interacting with customers and ensuring high rates of customer retention.

3.2 | Design of the intervention process

In line with the procedure of creative interventions in organisations (Brem, 2019), the first stage of the intervention focused on personal and professional entry to each organisation. This stage centred on utilising the HR and general managers in identifying the relevant organisational problems that the intervention would solve. The collaboration involved a series of meetings with each hotel to discuss the relevance and value of creativity and their commitment to participate in the structured intervention. Together, they were planning the content and procedure of structured interventions, identifying those who would participate and discussing expected outcomes. This involved explaining proposed intervention layout and creative techniques to be used to stimulate creative thinking. Several minor recommendations were made by organisations and considered by the researcher in the intervention procedure, namely the use of technological equipment, physical space, and event time arrangements. Consistent with Gill's (2018) recommendations, we reinforced the role of employee creativity within the workplace and the competitive advantage to be gained through employee involvement in creative training.

The second stage involved the administration of several diagnostic tools to access the creativity environment within each hotel and creativity related characteristics of employees participating in the intervention. The third stage involved the delivery of the workshop component of the intervention where participants worked through the CPS process to address their unique creativity problem. The fourth stage of the process involved the collection of post-workshop data on both individual and organisational characteristics. The fifth stage of the process involved periods of engagement with the four organisations to collect data on how they experienced the creativity training, the experiential learning process that they engaged in, the way in which they solved creativity problems, and the outcomes they achieved. A summary of the core stages of the structured intervention is presented in Figure 1.

3.3 | Data collection

We made use of multiple types of data collection which enabled the accumulation of varied and rich sources of information from the 50 participants within the four organisations. The study participants consisted of 47 front-line managers who worked in key divisions such as sales, marketing, rooms division, and food and beverages plus three gatekeepers (HR and general managers) who did not participate in the workshop component of the structured intervention. We included the latter to ensure that we had source triangulation which is important in HRM research (Christensen et al., 2019). In the sample, 60% of participants were female; 51% were aged between 21 and 30; 38% had more than six years of experience; and all participants had not previously participated in creativity training.

We generated primary data using structured pre- and post-workshop surveys, structured observations during the workshop (DeWalt & DeWalt, 2011), and post-workshop semi-structured interviews (Burgoyne & James, 2006). The surveys enabled us to collect quantitative data on individual characteristics. We collected data on (a) openness to experience, (b) conscientiousness, (c) extraversion, and (d) neuroticism (Barrick & Mount, 1991; Costa &

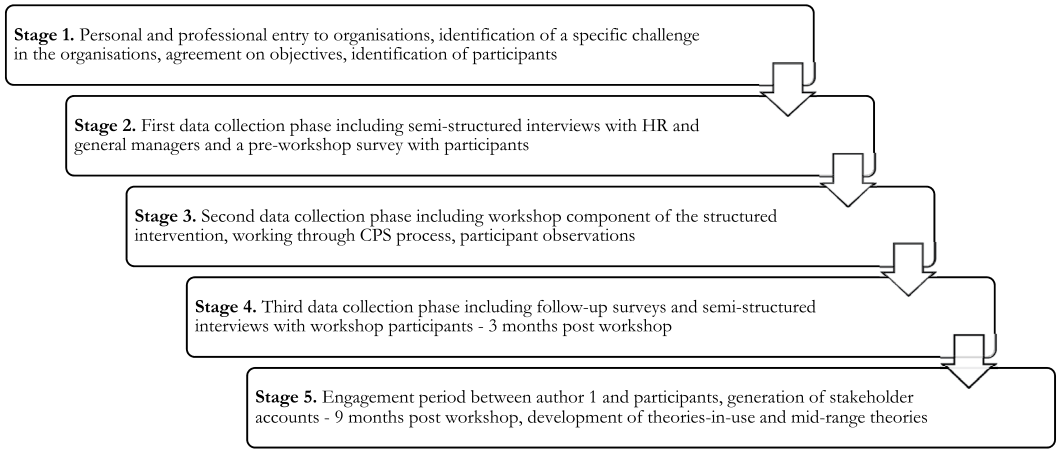

FIGURE 1 Core stages of the structured intervention

McCrae, 1992; Shalley et al., 2004), (e) creative self-efficacy, and (f) creative process engagement (Tierney & Farmer, 2002; Zhang & Bartol, 2010). We also collected data on four dimensions of the work environment (Amabile et al., 1996; Dul et al., 2011): (a) organisational encouragement for creativity, (b) managerial encouragement for creativity, (c) challenging work, and (d) work group supports. During the observation process, we collected qualitative data on creative thinking and creative behaviours, engagement with the artefacts, and communication and interaction among and with team members. The 23 semi-structured interviews were used to collect qualitative data on developmental processes around creativity, experiential learning processes, and KSA outcomes.

3.4 | Data processing and analysis

To analyse the data collected, we relied on an abductive approach that 'gives primacy to the empirical world' (Nenonen et al., 2017: 1132). During the conduct of the study, numerous anomalies in the data set were apparent. The implication of this for our analysis required the use of abduction defined as a 'cyclical process of identifying and confirming anomalies and generating and evaluating hunches' (Sætre & Van de Ven, 2021: 686). The process of data analysis consisted of four discernible stages that largely reflect the stages proposed by Sætre and Van de Ven (2021).

3.4.1 | Observation of anomalies

This stage involved first a careful reading of the transcripts and the development of four case histories. These helped us to understand the key phases of the experiential learning process and the role of the structured intervention in activating that process (Markowska & Wiklund, 2020). We then engaged in a process of thematic analysis involving continuous iteration between experiential learning theory and data which allowed us to identify inconsistencies or anomalies in the form of unexpected findings that were not in line with current understanding or theories. As opposed to the literature on experiential learning theory (Corbett, 2005; Kolb & Kolb, 2011), our data revealed the important role of team-based experiential learning processes. Moreover, our data revealed that the experiential learning process activated by the structured intervention was messy, unstructured, and at times iterative and regressive. These findings encouraged us to give more prominence to the occurrence of team-based creativity KSA outcomes derived from a structured intervention that was individual focused in terms of its content.

3.4.2 | Confirming the existence of anomalies

The second stage of the data analysis process focused on the confirmation of anomalies. This process involved us going back and forth between the theory and data and a process of reiteration (Locke et al., 2022). Sætre and Van de Ven (2021) were particularly helpful in this context, and we used their *who*, *what*, *where*, *when*, and *how* type questions. To confirm these anomalies, we further grounded the unexpected insights developed within our data set, using both the context of the study and literature on experiential learning. We explored in more detail the experiential learning processes experienced within the four organisations and identified how they were similar or different.

3.4.3 | Developing hunches about the findings

We drew on relevant literature within the learning and development and experiential learning fields (Kolb, 1984) to develop further insights into the key phases of the experiential leaning process, the types of activities that learners utilised during each phase, the role of key antecedents that might explain the process, and a categorisation of KSA outcomes. We depicted this process in a diagram to identify the distinct phases (see Figure 2).

3.4.4 | Finding explanations for the hunches

The final stage of the data analysis process involved finding explanations for the phases of the experiential learning processes that we identified. During this stage of the analysis, we used abductive reasoning to link these findings

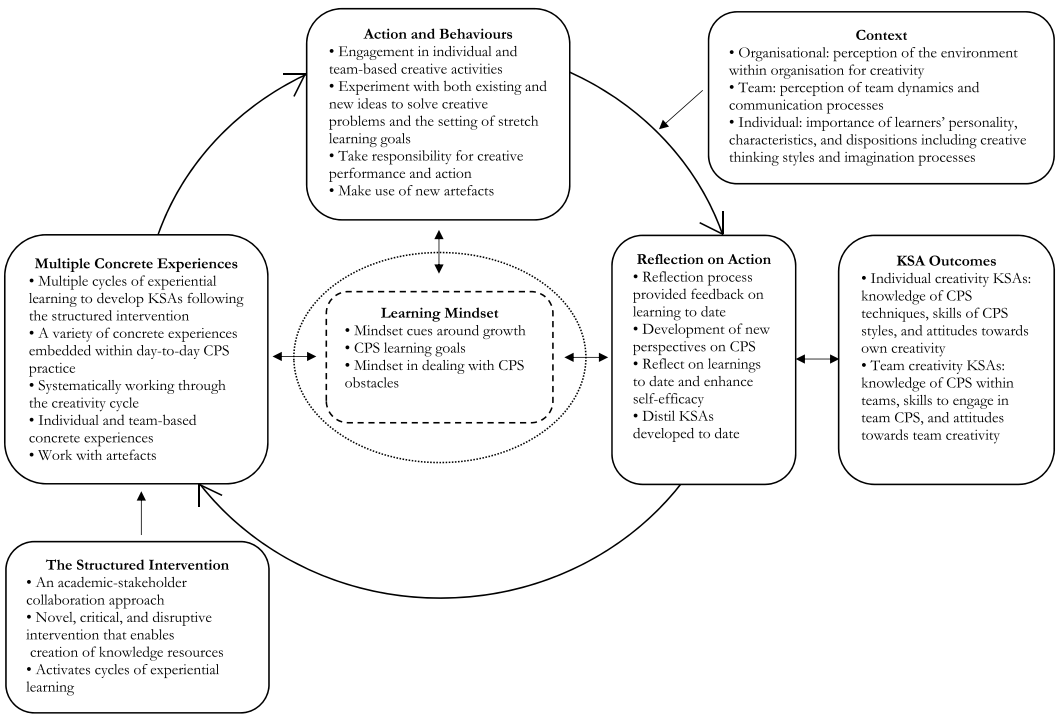

FIGURE 2 Intervention-activated creative problem-solving experiential learning process: Theory generated from theories-in-use

to theoretical concepts and research findings. We continually moved between the data and the relevant literature in experiential learning and creativity development acknowledging both its strengths and limitations. Our process of iteration led us to the important concept of learning mindset (Heslin & Keating, 2017) to explain the key underlying individual characteristic that helped the continued activation of the experiential learning process initially prompted by the structured intervention. We grounded this concept in and refined the phases of our experiential learning process.

We took steps to enhance the methodological trustworthiness of the data we collected. We made use of creativity and experiential learning theory to develop out interview themes; we utilised data triangulation through structured observation to ensure that we had holistically captured the phenomenon under investigation; and we paid careful attention to data collection survey and case study protocols. In addition, we documented our methodological approach in terms of being rigorous, reflective, and relevant (Coghlan & Shani, 2014). Specifically, we adopted the framework proposed by Pasmore et al. (2008) which is summarised in Table 1. To develop this paper, Author 1 brought her experience of working with the creativity literature and her experience of working with the four organisations. Author 2 brought his experience as a researcher in the HRM field and his knowledge of academic-stakeholder collaborations. Author 3 brought his extensive experience as an academic in HRM and HR development and of working collaboratively with organisations. Both Authors 2 and 3 played an important role in challenging Author 1 on her analysis and they particularly helped her to detach from her primary knowledge domain—creativity. They also complemented her existing knowledge and, to use the words of Van de Ven and Johnson (2006: 807), to 'relinquish [her] personal standpoint'. We implemented this process to bring to the data analysis a form of triangulation and objectivity.

4 | RESULTS

4.1 | Organising the structured intervention

The first substantive stage of the structured intervention involved the negotiation of conditions around its implementation. The aim of this stage was to ensure clarity concerning the type of outcomes that would be developed. During this stage, the focus was on agreeing on the nature and extent of the collaboration, clarity around the purpose of the structured intervention, the problems to be addressed, the requirements around data collection, planning and timing considerations, and issues around confidentiality. Given these constraints, the process then moved on to agreeing on two areas of focus: (1) to unpack KSA development through structured interventions, and (2) to understand the micro processes that are inherent in academic-stakeholder collaborations.

Following agreement on these focus areas, negotiation took place with the HR and general managers in the four organisations. This involved agreement around the design and delivery of the intervention, its key stages, agreement on the specific methods of data collection, and the analysis of the data. Each organisation took responsibility for the identification of the employees who would participate in the intervention and the logistical arrangements for the workshop component of the structured intervention.

4.2 | Getting the lie of the land

This stage involved gathering data prior to the workshop component of the intervention. This included surveys and interviews to identify characteristics of individuals and the organisations in terms of the environment for creativity. This helped to understand the context in which the intervention was undertaken and it revealed that the participants had a number of desirable creativity characteristics which pointed to a potential success of the academic-stakeholder

TABLE 1 Ensuring quality in the research process

The essence	Rigour	Reflective	Relevant
Purpose and rationale for action and inquiry • Case for action and research • Intended contribution	• Rationale for action is provided by stakeholders: The development of creativity KSAs	• Rationale is linked to past research and literature on Mode 2, events system theory, interventions, experiential learning, and individual creativity	• Stakeholders referred to limited training opportunities to enhance creativity for their staff
	• Rationale is underpinned by the scarcity of evidence on academic-stakeholder collaboration in the context of creativity development and HRM	• Rationale for structured intervention is supported by organisational issues, namely the need to accelerate creativity, business innovation, and performance	• Stakeholders required immediate structured interventions and actions to resolve strategic and operational issues around customer sevice
Context	• This research is undertaken in the context of four hotel organisations	• The research builds on past and current research on Mode 2 collaboration, creativity, experiential learning, and interventions	• The integration of Mode 2 research, structured intervention, event system theory, experiential learning, and creativity provides a unique analytical framework and theoretical and practical contributions
	• The research involves stakeholder reflection on the context and the competitive environment of the organsiation • The research involves academic engagement, including review and synthesis of the relevant literature on hotel organisations	• The research incorporates concepts from the event system theory perspective and characteristics of novelty, criticality, and disruption of such events to facilitate learning and creativity KSAs	
Methodology and method of inquiry • The role of the action researcher • Ethical issues • Learning mechanisms	• This research incorporates the methods typically used as part of academic- stakeholder collaborations	• The methdology as well as the action and research cycles are described in the methodology section of the paper and illustrated in Figures 1–3	• In advance of the structured intervention, the stakeholders and the first author agreed on the extent of engagement and the method of action to be used
	• The research involves collaboration between stakeholders and the first author in the selection of methods of action and throughout the entire research process	• In advance of the structured intervention, stakeholders were provided with information about the research process and a consent form (see methodological notes)	• The stakeholders provided a problem specific to their organisation to be addressed during the structured intervetion
	• The method of action is informed by the CPS process	• Consent forms were signed by stakeholders who were the study participants (see methodological notes)	• The structured intervention followed the requirements of Mode 2 knowledge production

TABLE 1 (Continued)

The essence	Rigour	Reflective	Relevant
Design	• Data were collected and analysed using the abductive research approach	• This research was designed and implemented in collaboration between stakeholders and the first author	• The first author clarified and explained the research questions them to each organisation
	• The research design was informed by multiple methods of data collection during the structured intervention including structured pre- and post-workshop surveys, structured observations during the workshop, and post-workshop semi-structured interviews	• The first author took on the key role of an academic facilitator	• Stakeholders within the four organisations identified study participants to participate in the workshop component of the structured intervention
	• Data were generated, collected, and explored in collaboration between stakeholders and the first author	• In advance of the intervention, the first author negotiated conditions with each organisation	• Inclusion criteria were requested by the first author: Interest in creativity by study participants, middle- and senior management hierarchy, involvement in key organisational functions
	• Data were further explored in collaboration between the three co-authors	• Confidentiality and anonymity of data was ensured by the first author • Study participants had an option to opt out from this research at any stage • Over the duration of this research, the first author maintained the relationship with stakeholders via correspondence and visits	• The first author clarified the roles of stakeholders and study participants as well as issues around their involvement in the structured intervention

(Continues)

TABLE 1 (Continued)

The essence	Rigour	Reflective	Relevant
Narrative and outcomes	• The three authors used the abductive approach to data analysis: Empirical data in combination with existing theory to develop and refine existing concepts and develop new theory	• The story being told is interpreted in collaboration with stakeholders and study participants who helped the researchers to clarify their meaning and intentions	• Learning mindset emerged as playing a central role in sustaining the experiential learning process that led to the development of creativity KSAs
	• Cycles of action and reflection were presented in a systematic way	• The story being told is interpreted in collaboration with stakeholders and study participants who helped the researchers to clarify their meaning and intentions	• Learning mindset influenced interest and motivation of participants to engage in multiple learning cycles
	• The story was told in a neutral and factual manner and narratives were separated from interpretations	• The post-workshop survey and post-workshop semi-structured intereviews with stakeholders and study participants facilitated their voices and perspectives	• Learning mindset influenced interest and motivation of participants to engage in multiple learning cycles
	• The story was told using insights from the creativity literature (Author 1), the experiential learnig literature, and lirerature on academic-stakeholder collaborations (Authors 2 and 3)	• The story was further interpreted using methods of data triangulation and collaboration between the three co-authors	• Completion of the structured intervention led to both individual and team creativity KSAs • Experiential learning can be conceptualised as a team learning process in addition to an individual learning process • Completion of the academic-led structured intervention gives rise to both theories-in-use and academic theories
Reflection on the story and outcomes	• Findings of study participants are reported using the abductive research approach	• Nine months following completion of the structured intervention, the first author spoke with study participants and discussed possible actions around creativity and development	• The participating organisations acknowledged a difference in creativity of employees

TABLE 1 (Continued)

The essence	Rigour	Reflective	Relevant
	• Feelings are reported in the language and manner that is relevant to both academics and stakeholders	• The study's co-authors completed rounds of paper iterations to ensure a shared meaning of the story	• The participating organisations acknowledged that completion of the structured intervention contributed to their needs addressing operational and strategic issues around creativity
	• Perceptions address the components of the intervention including the context, learning mindset, multiple concrete experiences, action and behaviours, reflection on action, and creativity KSAs		• Findings highlight the value of collaboration between stakeholders and academics in the context of creativity development • Findings generated new theoretical insights on the development of creativity KSAs in organisations via the experiential learning process
Discussion	• Academic-stakeholder collaborations are effective in research projects that seek to achieve both theory and practice contributions	• Academic- stakeholder collaboration requires a close partnership with stakeholders across the full collaboration process	• KSA outcomes: The results of academic-stakeholder collaboration can lead to a permanent change in KSAs such as individual and team creativity KSAs
	• Such collaborations can bridge scholarly-based knowledge with practice, whilst at the same time addressing organisational issues	• Dialogue and trust are imperative to academic-stakeholder collaboration and lead to more open and complete stories and perspectives	
	• The results of these collaborations help surface stakeholders' theories-in-use and strategies (such as those around CPS) ready to be applied in day-to-day work	• It is imperative to build a common knowledge and understanding with stakeholders when working in an academic-stakeholder collaboration	
	• The results of collaboration help the emergence of theories and knowledge that can be replicated in other settings and contexts		

collaboration. For example, individuals were effective on desirable creativity personality traits such as conscientiousness, extraversion, and openness to experience.

The data revealed mixed findings when it came to the environment for creativity including culture of creativity, freedom to carry out projects, and managerial encouragement for creativity. The data also revealed important impediments to creativity including the lack of recognition that creativity was important, resistance to new ideas, the lack of rewards for creativity, and fear amongst managers to take risks. These impediments are consistent with Argyris (1970) and Schein (2008) who argued that impediments are located or grounded in stakeholders' theories-in-use. In addition, these theories-in-use may vary considerably from what is espoused by organisational decision makers. This data helped to shape expectations concerning the potential effectiveness of the structured intervention to enhance CPS and address important organisational challenges.

4.3 | Developing insights on the role of the workshop in activating experiential learning

This stage focused on the delivery of a series of structured classroom-based workshops with middle and senior management and HR staff within the four organisations. Several important insights emerged from the data collected through observation during the workshop including the importance of teamwork, the role of the facilitator in helping employees to generate ideas, the quick generation of ideas, the development of multiple ideas, the exploration of connections between ideas, the recording of ideas, the discussion of ideas with the academic, the solicitation of feedback on ideas, the selection of the best ideas, the presentation of ideas with other teams, and engagement in follow-up activities. These insights were generated utilising the observation protocol described in the methodological notes. The workshops were transformative in terms of activating an experiential learning process. The academic facilitator also played an important role in keeping employees focused on the creativity development tasks and working through the CPS process.

4.4 | Developing insights around the context, process, and outcomes of experiential learning

Having completed the workshop component of the structured intervention, the next stage focused on employees' use of CPS to address creativity problems within their respective organisations. Post-workshop survey and interview data allowed us to develop several important insights from this stage of the process. First, the learning mindset of employees emerged as central to their engagement in CPS and the development of their KSAs. Dimensions of the learning mindset that emerged as important included the belief by employees to develop CPS, openness to new learning situations, the opportunity to focus on learning, and the capacity to see the bigger picture. We found that employees were committed to using CPS techniques and taking responsibility for creative performance. Our data also revealed changes related to the individual and organisational contexts. At an individual level, we found an increase in achievement striving, excitement seeking around creativity, risk taking to solve creative problems, and assertiveness to address creativity problems. In terms of the organisational context, the data highlighted a decrease in the organisational impediments around CPS and some small changes in terms of resources for creativity.

Employees showed a strong commitment to using team CPS situations as opportunities to learn and to engage in dialogue with both self and others. The dimensions of action, in the context of the experiential learning process, included experimenting with CPS techniques, taking on a leadership role for a team, the use of team facilitation activities, and the implementation of brainstorming activities. Reflection emerged as a vital component of the experiential learning process. This included both self- and other-focused reflection. Dimensions of self-reflection included the use of artefacts at work to develop creativity KSAs, identification of what worked well and what did not, and reflection on the ideas created by others. Other-focused reflection activities included team reflection processes,

ideas exchange and questioning of others, and gaining insights into how other employees and teams addressed CPS activities.

As the experiential learning process evolved, we found several important KSAs in the context of CPS, emerging in an incremental and additive way. Knowledge outcomes included awareness of different styles of CPS, knowledge of CPS techniques, and increased understanding of the key stages of the CPS process. Key skill outcomes included the application of CPS techniques and the skills to engage in team CPS. Important attitude outcomes that emerged included increased openness to CPS situations, belief in capabilities to address CPS situations, and the importance of proactivity.

Table 2 summarises some of the high-level findings from the study and Figure 2 presents our conceptualisation of the CPS experiential learning process, and we also report here some other important findings to emerge from the academic-stakeholder collaboration. In terms of the generation of theoretical insights about the process of developing creativity KSAs, we found that it is an iterative and recursive process that involves both individual and team-based experiential learning processes (Figure 2). This process leads to important learning outcomes that focus on learning about creativity, learning to do CPS, learning to become confident in CPS, and learning to engage in CPS with others. The centrality of stakeholders' theories-in-use emerged as important to the learning process. When it came to insights about the academic-stakeholder collaboration (Figure 3), our finding reveal tensions concerning the time scales involved, the potential to agree on a practice problem that met the requirements of both stakeholders and academics, and the role of time in building a relationship and a sense of identity.

5 | DEVELOPING THEORIES-IN-USE ABOUT CREATIVE PROBLEM-SOLVING

We define theories-in-use as those that can be inferred from action (Argyris et al., 1985). According to Argyris and Schön (1978), this includes the mental maps that employees have about their actions in the context of creativity. These mental maps are instrumental in guiding the creativity actions of employees. Employees within the four organisations began to use artefacts and techniques to engage in CPS. We describe some of these components in the methodological notes. The use of CPS artefacts began to evolve over time reflecting employees' increased confidence and improvements within each organisation in terms of climate for CPS. Before the intervention, these organisations did not practice CPS in a structured way and had few insights concerning the artefacts that they could use in this context. Employees provided descriptions of elements of practice including drawing mini circles of opportunities in their diaries, selecting ideas from the circle, and exploring connections between them. The use of diaries assumed greater importance and centrality to the CPS process as did the use of flipcharts and team brainstorming. Interactions during the collaboration reinforced understanding of these techniques and artefacts and participants were able to point to successes from using these approaches. The learnings from the workshop component of the structured intervention directly informed participants' approaches to CPS and provided them with the confidence and motivation to interpret what they were doing. The participating organisations gained insights into how the CPS process can be systemically linked to day-to-day work routines and activities.

6 | BUILDING THEORY ABOUT CREATIVITY DEVELOPMENT FROM THEORIES-IN-USE

In parallel with stakeholders' theories-in-use, we capitalised on various knowledge resources developed through links with the four organisations. The analyses of data collected throughout the structured intervention helped the development of insights about the role of experiential learning processes and the centrality of learning mindset in the context of CPS and creativity development. As the collaboration evolved, there was more engagement with theoretical insights around experiential learning theory and the contribution of HR practices to creativity development in organisations. Together, they combined complementary perspectives leading to engagement with research domains

TABLE 2 Key findings emerging from the study

Dimensions	Findings	Illustrative examples
Context	Organisational context: Less positive perceptions of support for creativity, including lower organisational encouragements to participate in creative work; limited managerial encouragement to take risks and develop creativity; some access to materials/equipment for creative work	*We have a communication problem… If someone at the top comes up with a new idea, it is not always filtered down correctly; the same as the other way… this does not encourage people to want to be more creative* (Trainee Manager, HoCo2)
	Team context: Evidence of moderate work group supports when it comes to creativity, including willingness to help each other and willingness to work together on complex problems	*We do not have a strong team culture when it comes to complex problem-solving* (Operations Manager, HoCo3)
	Individual context: Less favourable attitudes towards own creativity, including openness to new ideas/training; however, a strong preference to work with others on complex tasks, and creative self-efficacy	*Being creative would not be one of my strongest attributes* (Digital Marketing Manager, HoCo4)
Learning mindset	Mindset cues around growth: Strong beliefs concerning the importance of creativity in own job; openness to participate in new learning experiences around creativity; positive attitudes to the structured intervention as a valuable development opportunity	*Creativity is important in my profession, but I do not think that I am creative, I do not like being creative; I want to change this* (Training Manager, HoCo2)
	CPS learning goals: Strong commitment to learn about how to be more skilled in the area of creativity; strong interest to learn about how to approach difficult and unfamiliar problems	*I often find it challenging to think creatively and my go to response is to rely on previous experience; I want to learn how I can get more creative in my job role* (Duty Manager, HoCo1)
	Mindset in dealing with CPS obstacles: Evidence of willingness to take responsibility for own creative behaviours and performance; strong commitment to continual learning about creativity	*I know that I have to work beyond my normal work understanding and learn a lot to fully embrace creativity* (Operations Manager, HoCo4)
Multiple concrete experiences	Multiple cycles of experiential learning: Completion of CPS stages during the structured intervention; evidence of commitment to resolve problems creatively; willingness to apply CPS to own problems at work	*Participants complete stages of creative problem-solving; they come up with a variety of different and novel ideas to their problem* (extract from participant observations)
	Individual and team-based concrete experiences: Evidence of creativity-related cognitive processes and behaviours including divergent (novelty, a variety of ideas, fluency) and convergent thinking	*Inspires less engaged team members to work together on CPS and involves these peoplee in discussion by asking: 'what do you think? Does it make sense?'* (Food and Beverage Manager, HoCo2)
	Work with artefacts: Evidence of effective application of the artefacts to own work; evidence of reflection on the role of artefacts for CPS	*I liked to work with the artefacts, for me it was a sort of a game, and everyone including myself wanted to play it* (Operations Manager, HoCo3)

TABLE 2 (Continued)

Dimensions	Findings	Illustrative examples
	Concrete experiences embedded within day-to-day CPS practice: Evidence of completion of CPS; development of own ideas; exchange of ideas; evidence of the development of final solutions with others	*It takes less than 5 minutes for some participants to generate ideas and complete stages of CPS; the participant asks, 'what should we do next?'* (Duty Manager, HoCo1)
	Working through the creativity cycle: Evidence of interest; practice CPS to own work; evidence of developing CPS instructions in own time	*I revise the CPS techniques that we did during the workshop… I am planning to do similar workshop with my own team* (Events Coordinator, HoCo2)
Action and behaviours	Engage in individual and team-based creative activities: Evidence of embedding CPS techniques in daily work; spreading the word about creativity and encouragement of own team to learn about creativity	*I developed an idea with my team; I trained my team in creativity and explored that idea together with them* (Marketing Manager, HoCo3)
	Experiment with new approaches and set stretch learning goals: Evidence of commitment to team-based CPS as an opportunity to learn more about creativity; use of team facilitation activities such as team training in creativity; getting feedback on own creativity	*Everyone in the hotel seems to have tried to use what we learnt in the workshop to change how we think about problems; I tried to use outside-the-box thinking to explore potential solutions to the work engagement problem* (Duty Manager, HoCo1)
	Take responsibility for creative performance in action: Evidence of delivery of team CPS sessions at work; taking initiative to explore problems with own team; encouragement of own team to practice CPS; exchanging ideas; participation in idea evaluation activities	*I have a range of problems at work… now I am trying to take responsibility and identify a creative way of dealing with those problems with my team or figure out a way to approach things* (Reservations Manager, HoCo1)
	Make use of new artefacts: Evidence of the use of brainstorming exercises with own team; use of a range of CPS artefacts in own work to facilitate CPS	*I organise group meetings with the team and we all brainstorm creative ideas; I use the same artefacts when I have a discussion with the staff* (Assistant General Manager, HoCo2)
Reflection on action	Process provided feedback on learning to date: evidence of recognition for creative work by a professional body; gaining trust from line manager and support from own team and others	*This hotel nominated me for the Hotel Hero Award through the Northern Ireland Hotels Federation and part of the reason was the creative approach that I took to increase health and wellbeing for staff* (HR Manager, HoCo1)
	Develop new perspectives on CPS: Evidence of the use of diaries to practice creativity; involvement in learning from colleagues who achieved success in CPS; getting inspired by colleagues' experiences	*I use my own diary to practice the CPS technique in my work; this is kind of a mind map helping me identify more than one solution and see which one works better* (Digital Marketing, HoCo4)

(Continues)

TABLE 2 (Continued)

Dimensions	Findings	Illustrative examples
	Reflect on learning to date: evidence of evaluation of own learning experiences in terms of what worked well and what did not; development of confidence in the use of CPS in a work setting	*After the workshop, I understood that it is not just me who has all ideas; it is using other people's ideas as well to develop mine and also come up with better solutions* (Trainee Manager, HoCo2)
	Distil KSAs developed to date: evidence of positive feelings (confidence/motivation) to participate in creative work and interpret outcomes; exploration of remedial actions to support KSA development	*I got some confidence in my creativity but more learning is needed; there should be more opportunities to learn about how to work as a team, how to solve problems together* (Accountant Manager, HoCo1)
KSA outcomes	Individual outcomes: Evidence of new knowledge of CPS techniques and key stages; new skills to employ CPS in own work and work with others; new attitudes to own creativity	*The workshop changed my knowledge about creativity and way of thinking and how I could develop in becoming more creative to benefit not only the business but my team as well* (Marketing Manager, HoCo4)
	Team outcomes: Evidence of new knowledge of how to apply CPS techniques with teams; new skills to engage in team CPS; new attitudes to team CPS and own role in team creativity	*The workshop helped to develop my ability as a team leader, so that I can train my team in creativity and work together on business and departmental problems* (Events Coordinator, HoCo2)

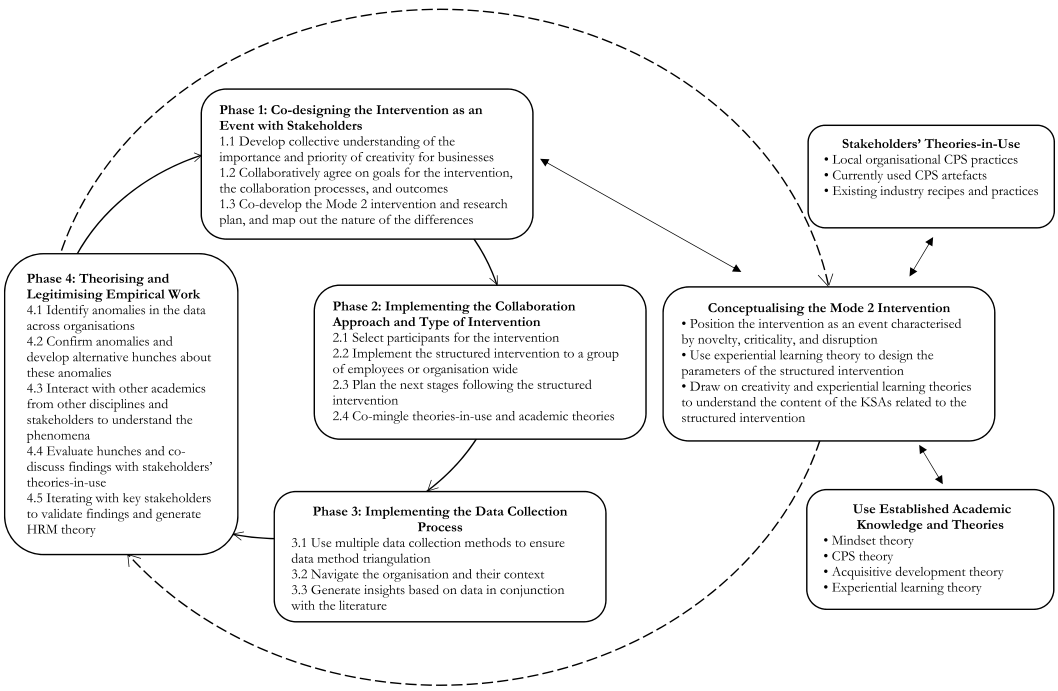

FIGURE 3 Academic-stakeholder collaboration process for Mode 2 knowledge production

such as acquisitive development (Garavan et al., 2015), self-directed learning (Merriam, 2018), self-regulated learning (Sitzmann & Ely, 2011), mindsets (Dweck, 2017), learning mindsets (Heslin et al., 2020), and experiential leadership development (Ashford & DeRue, 2012). Following further refinement of the data analysis, including the development of second order codes and aggregated dimensions, allowed the exploitation of the data for academic purposes. This led to the production of what Nenonen et al. (2017) call context-specific academic knowledge which is considered essential to Mode 2 theorisation. Specifically, we developed HRM theory to explain the phenomenon under investigation. This HRM theory was derived through the integration of theory with empirical research (Merton, 1968). We started with an empirical phenomenon as opposed to a broad abstract idea which is the focus in grand theorising. Figure 3 presents our conceptualisation of the academic-stakeholder collaboration process.

7 | DISCUSSION

In this section, we highlight our contributions and impact of the academic-stakeholder collaboration. We make three important contributions to the literature around (1) the development of theoretical insights concerning the process of experiential learning that underpins the development of creativity KSAs, (2) the dynamic micro processes of the academic-stakeholder collaboration, and (3) the role of theories-in-use in generating theory within HRM.

Our first contribution stems from the generation of theoretical insights about experiential learning process that is activated through the workshop component of the structured intervention, sustained through the operation of the learning mindset of employees during day-to-day work activities, and reflected in stakeholders' theories-in-use. We theorised a structured intervention as a workplace event that had novelty, criticality, and disruption, and thus activated employees to engage in the development of their creativity KSAs (Morgeson et al., 2015). The key components of the experiential learning process model are depicted in Figure 2. Starting at the bottom-left side of the model, we give focal attention to the *structured intervention* which provides the arena for the collaboration of both academics and stakeholders. The intervention enabled both parties to delimit their roles and manage the evolving relationship (Coughlan et al., 2021). In terms of an academic-stakeholder collaboration, it aligns with the recommendations put forward by Van de Ven and Johnson (2006) in that it addressed a real-world problem but also allowed for framing of two research questions that address shortcomings in the literature. The intervention additionally set boundaries around the role of both parties and the resources they could contribute, and it allowed a process to evolve that resulted in the development of data and theoretical insights (Crespin-Mazet et al., 2017).

We now move to the *context* component which we depict at the top-right side of the model. We conceptualise context in terms of organisational (Amabile & Pratt, 2016), team, and individual (Anderson et al., 2014) dimensions. At an organisational level, we refer to perceptions of the work environment (Amabile et al., 1996; Dul et al., 2011); at a team level, we considered perceptions of team dynamics and communication processes; at an individual level, we included aspects such as creative thinking styles and imagination processes (Tierney & Farmer, 2002; Zhang & Bartol, 2010). These characteristics are represented as proximal contextual conditions that impact the experiential learning process of employees as they develop their creativity KSAs.

Central to our model and sustainment of experiential learning is *learning mindset* (Heslin & Keating, 2017: 370) which is conceptualised as 'a mental framework that guides how people think, feel and act in challenging achievement situations'. This conceptualisation also points to the potential of employees to develop creativity KSAs. The development of these KSAs is a complex task that requires employees to set challenging learning goals (Burnette et al., 2013), to identify learning strategies to achieve these goals, and to show persistence until these goals are achieved (Blackwell et al., 2007). We propose that a strong learning mindset helps employees to navigate the experiential learning journey involved in developing creativity KSAs. It also shapes the ways in which they engage with this learning process.

We now turn to the key components of the experiential learning cycle and illuminate how this cycle emerged in the context of the development of creativity KSAs. We first propose that employees will, consistent with an acquisitive

development concept, work through *multiple concrete experiences* (Kolb & Kolb, 2011). These concrete experiences are embedded within day-to-day CPS practice, provide employees with the opportunity to work through the creative cycle, consist of both individual and team-based elements, and involve the use of various creativity artefacts, or, what we conceptualise as their theories-in-use. Individuals can react to identified creativity problems in two ways: taking a narrow focus and using existing solutions or taking a broader focus and generating novel ideas. This occurs as individuals gain confidence through successive cycles of experiential learning. The strength of individuals' learning mindsets will prompt them to engage with a greater range of concrete experiences and a broader range of artefacts to develop their creativity KSAs (Cury et al., 2008).

The next phase of the experiential learning process focuses on *actions and behaviours*. Here, a strong learning mindset helps employees to engage in experimentation that is conducive to the development of creativity. It will also help them to set stretch learning goals which contribute to the development of specific KSAs. Learner experimentation is also co-active to opportunities to receive feedback, which is considered imperative for creativity, learning, enhanced effectiveness in CPS, and KSA development (De Stobbeleir et al., 2011). During this phase, individuals with a learning mindset will seek out more information from feedback and view it in a positive way. They are also more likely to seek feedback when they are faced with difficult and challenging CPS situations (Heslin & VandeWalle, 2005). We also envisage that employees with a learning mindset will make greater use of creativity artefacts and experiment more with their use and effectiveness.

The next phase of our model envisages that the process of action and behaviours leads to *reflection on action*. This involves looking at what happened in specific problem situations, making sense of what happened, abstracting what can be learnt from experience, and exploring what remedial action can further enhance KSA development. This process is also infused with employees' learning mindset, arguing that where it is strong, they are more likely to engage with reflection on action processes. Employees are also likely to explore alternative approaches and learn from colleagues who have achieved success in CPS (Nussbaum & Dweck, 2008). We found that an important component of reflection in action in the context of creativity concerned the distillation of learning from experience and what might be done differently to achieve more effective KSA development.

The final component of our model focuses on *KSA outcomes*. We envisage a bi-directional relationship between KSA outcomes and the reflection on action component of the experiential learning process. Our data points to both the impact of reflection on action in leading to KSA outcomes and the influence of these KSA outcomes on future cycles of experiential learning (Garavan et al., 2015). We conceptualise knowledge outcomes in terms of awareness, belief in understanding of CPS, and understanding the value of the structured intervention. Skill outcomes refer to the application of CPS techniques in own work, taking initiative to solve problems, and improving business performance. Finally, attitude outcomes consider employees' feelings and self-belief towards creativity, and openness to creativity development. These KSA outcomes feed into a virtuous cycle of continuous refinement as employees work through multiple cycles of experiential learning (Kolb & Kolb, 2011). Ultimately, the range of individual and team-based creativity KSA outcomes achieved by participants demonstrates the broader impact of our collaboration (Wickert et al., 2021), beyond elite-focused approaches (Bresnen & Burrell, 2013).

Through the illumination of this process, several important insights emerge concerning the nature of the experiential learning process. In the context of the development of creativity KSAs, we highlight the central role of a learning mindset within the experiential learning process in that it infuses all stages of the process. In contrast to employees with a fixed mindset, individuals with a learning mindset demonstrate a desire to learn and persevere despite potential obstacles. Our experiential learning process which encompasses concrete experiences, action and behaviours, and reflection on action highlights that it can be conceptualised as a team process which contrasts with the extant literature (Becker & Bish, 2017) which emphasises experiential learning as a solo process. We also reveal the important role of artefacts for creativity KSA development which give effect to stakeholders' theories-in-use and are fundamental to the experiential learning process. In addition, we highlight the importance of a contextualised model of experiential learning when it comes to the development of KSA outcomes. KSA development as an experiential learning process begins with the perception of a situation by the learner who assesses the perceived complexity

of the creativity task. This, in turn, impacts how the challenge is addressed and can include a narrower perspective where an employee using an existing approach to solve the creativity task; alternatively, the employee may take a broader approach that comes from experience and enhanced self-efficacy, resulting in new ideas and engagement in a continuous process of experiential learning. These insights represent important additions to our understanding of experiential learning theory in the context of a specific domain of KSA development—creativity.

Our second contribution focuses on unpacking the dynamic nature of academic-stakeholder collaborations in the context of a structured intervention. Figure 3 illustrates the key phases of this collaboration and in doing so depicts this process as somewhat linear and one characterised by little tension and paradox; however, in reality it was something more complex. We particularly note the following five complexities. First, we were able to develop insights about a practice problem that met the needs of the participating organisations and allowed the academics to develop insights concerning the nature of the gap and the manifest tensions inherent in it. We were therefore able to accommodate a variety of interests and priorities (Kelemen & Bansal, 2002). Second, what became particularly evident throughout the collaboration and the implementation of the structured intervention was the issue of time orientations (Bansal et al., 2012; Bartunek & Rynes, 2014). The four hotels were essentially looking for a quick and rapid response to a creativity problem whereas the researchers were more interested in having a longer period of observation, reflection, and synthesis to theorise the gap. Third, the collaboration process also revealed differences in terms of how problems were defined and addressed. The stakeholders, for example, took the messy reality of the problems in practice as taken for granted, whereas we researchers were more focused on neat and precise definitions of the research problems and the need to map out the research and intervention processes. Fourth, we also developed insights about the scope and length of an academic-stakeholder collaboration. Scholars such as Wenger (1998) highlighted the importance of developing a sense of shared identity that only comes through a long period of collaboration. The academic-stakeholder collaboration reported in this study was of limited duration (less than a year) and could be viewed as a data collection opportunity rather than something more profound (Van de Ven & Johnson, 2006). Fifth, our study reveals the importance of contextual expertise in developing HRM theory from academic-stakeholder collaborations (Gümüsay & Amis, 2020). The use of a structured intervention helped to generate in-depth insights into the settings in which managers engaged in CPS while also maintaining important critical distance from these settings. This contextual expertise related to the generation of a depth and breadth of understanding of the four empirical sites and the scope to engage, capture, comprehend, convey, and confirm the characteristics of the research settings.

Our third contribution concerns insights about the links between theories-in-use and the development of HRM theory that have potential application in multiple contexts. A theory-in-use approach capitalises on the mental models of stakeholders and builds them into theories that advance HRM practice (Argyris & Schön, 1978). We suggest that such an approach helps us to better communicate with stakeholders in a language they understand. Additionally, such an approach takes away the necessity to borrow theories form other disciplines and force-fit them to provide a foundation for our research, consequently losing touch with HRM practice. Other scholars have suggested that the process of borrowing frameworks and theories restricts researchers to what they already know, rather than coming up with something novel (Zeithaml et al., 2020). We acknowledge that in the context of generating new insights in this study we were shaped by the knowledge and experience of study participants. We do however suggest that structured interventions provide researchers with the potential to surface interesting and novel theories that can provide the basis to enhance HRM practice and scholarship. We also acknowledge that there will be debate concerning the type of theory that is generated. For example, Banks et al. (2021) characterises the theory developed as 'intermediate' in that it is based on direct evidence from multiple sources with the potential for alternate explanations. Others suggest that it is 'mid-range' theory, appropriate to a particular context rather than the development of a 'grand' theory (Nenonen et al., 2017). The argument goes that to produce grand theories, it is necessary to apply these mid-range theories in other contexts and scrutinise the results in the academic domain.

8 | CONCLUSION

In this paper, we have reported on a structured intervention as a form of Mode 2 knowledge production with two purposes in mind; first, to gain insights on the role of structured interventions to develop theory about creativity KSAs; and second, to understand the micro processes involved in an academic-stakeholder collaboration. We conceptualised the structured intervention using an event system perspective which was driven by the organisations' needs to address a specific and relevant creativity problem. This allowed us to produce new theoretical insights on the development of creativity KSAs in organisations, illuminating the experiential learning process and providing insights on the micro processes involved in developing HRM theory. We therefore provide evidence that knowledge production and new theoretical HRM insights can be generated by stakeholders and academics in the context of application and practice in organisations.

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CONFLICT OF INTEREST

We do not have any competing interests to disclose.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are available on request. The data are not publicly available due to containing information that could compromise the privacy of research participants.

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E-voice in the digitalised workplace. Insights from an alternative organisation

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Abstract

Digitalisation permeates all aspects of organizational life, especially the ways we communicate with each other. Drawing on a case study of an alternative organisation—the German collective Premium, which is almost entirely digitally organised—we seek to explore contextual factors that facilitate or hinder the expression of electronic voice (e-voice). Based on 20 semi-structured interviews with different members of the collective, we identified various contextual facilitators and barriers to e-voice expression: Collective belief in the value of diverse voices, cautious online and complementary face-to-face communication facilitate e-voice, while less formalised structures, power and knowledge asymmetries, and information overload hinder it. These findings demonstrate that despite an alternative organisation's firm intention and self-reflective efforts to create an inclusive and participatory digital space, tensions arise. Further, our study contributes to employee voice theorising by outlining contextual factors that are specifically relevant to e-voice practices.

KEYWORDS
alternative organisation, collective, digitalisation, e-voice, electronic voice, employee voice

Abbreviations: e-voice, electronic voice; HR, human resource.

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Practitioner notes

What is currently known?

- Being able to voice concerns and ideas has a positive impact on employees and the success of the company.
- Digital tools such as social media are important channels through which employee voice is expressed.
- The conditions under which electronic voice (e-voice) is facilitated or hindered are unclear.

What this paper adds?

- Identification of facilitators and barriers to e-voice.
- Collective belief in the value of diverse voices, cautious-online, and complementary face-to-face communication facilitate e-voice.
- Less formalised structures, power and knowledge asymmetries, and information overload hinder e-voice.
- Empirical insights from a unique case study.

The implications for practitioners:

- Train your employees to be cautious, self-reflective, and deliberate in their online communications.
- In highly digitalised work environments, implement practices that ensure opportunities for complementary face-to-face communication and building personal relationships.
- Assign roles and responsibilities to strengthen accountability and ensure that electronic voices are heard, and appropriate ideas are effectively put into practice.

1 | INTRODUCTION

Digitalisation is pervasive and is triggering fundamental changes in the way we work, communicate, and collaborate in organisations. For example, social media platforms that allow people to connect and share information are increasingly replacing or complementing face-to-face communication (Holland et al., 2019; Martin et al., 2015; Mennie, 2015) and teamwork is often organised virtually (Kremer & Janneck, 2013). The literature on employee voice shows that allowing employees to voice concerns, make suggestions and participate in decision-making has a positive impact not only on employee well-being and sense of inclusion (Bell et al., 2011), but also on organizational effectiveness (Nechanska et al., 2020) and success (Townsend et al., 2020). Therefore, it is critical for practitioners and scholars to better understand the conditions under which voices are expressed electronically through digital tools such as social media, chat rooms, or blogs. However, our knowledge of electronic voice (e-voice for short), is currently limited and researchers are calling for more studies to improve our understanding of the phenomenon (Balnave et al., 2014; Townsend et al., 2020). In addition, more studies of voice in different organizational settings are needed to better contextualise the phenomenon (Gilman et al., 2015). The goal of this paper is to address these deficits and explore facilitators and barriers to e-voice in the specific organizational context of an alternative organisation.

To investigate this question, we adopt an exploratory approach and use a single, in-depth case study design of a collective called Premium. Premium is a German beverage company formally owned by its founder, who democratically shares decision-making with a network of freelancers, all of whom together build the collective and collaboratively define its values and goals (Knoch, 2019). Alternative organisations, such as the Premium collective, are interesting fields of inquiry because they stand for principles such as democracy, participation, solidarity, and equality (Cheney, 2014; Parker et al., 2014; Reedy & Learmonth, 2009). The combination of these principles—assuming they are rigorously implemented—is intended to create an organizational space in which individuals are autonomous, free to express their opinions, and participate in decision-making (Maeckelbergh, 2014). In addition, Rothschild (2016) particularly emphasises the relevance of the Internet for those alternatives to bureaucratic forms of organisation,

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which she refers to as 'Democracy 2.0', as for example, 'all relevant information and relationships be shared with the group at hand' (p. 10). Therefore, alternative organisations, with their emphasis on participation and electronic communication, provide a particularly rich research context in which to study e-voice.

Theoretically, our research efforts draw on the literature on employee voice with a particular focus on deciphering the organizational contextual factors that contribute to voice expression. We aim to contribute to the literature on employee voice by explaining the specific conditions under which e-voice occurs—presenting opportunities, but also drawbacks in a highly participatory and digitalised environment.

2 | EMPLOYEE VOICE IN CONTEXT

Employee voice 'describes how employees concerns, express, and advance interests, solve problems, and contribute to and participate in workplace decision-making' (Pyman et al., 2006, p. 543). Scholars conceptualise various voice schemes such as depth (the extent of employee influence), the scope of issues addressed, the level at which decisions are made, and the form, such as direct or indirect voice (Nechanska et al., 2020; Wilkinson et al., 2014). In this study, we focus on direct voice, that is, mechanisms that enable individual involvement and participation, rather than indirect voice, that is, collective employee representation through union and non-union structures, such as advisory committees or works councils (Marchington, 2008).

There is a large body of literature that addresses the contextual factors that influence direct voice and identifies ways in which a more or less conductive environment for employee voice can be created—including voices that challenge the status quo and therewith make an important contribution to organizational success (Klaas et al., 2012; Martin et al., 2015; Morrison, 2011). These contextual factors can be broadly divided into structural and cultural aspects (cf. Morrison, 2011).

Structural aspects refer to the type of organisation, hierarchy, and power. Less hierarchical structures such as teams without formal authority over each other (Ohana & Stinglhamber, 2019) and small or self-managed groups (LePine & Van Dyne, 1998; Ramchandani & Singh, 2020) facilitate voice. In addition, Wood and Fenton-O'Creevy (2005) emphasise the importance of employees having access to relevant information, the opportunity for consultation, and shared decision-making in order to raise their voices. In contrast, in organisations with highly centralised decision-making processes, upward feedback is often unwelcome and therefore leads to employee silence (Morrison & Milliken, 2000). Similarly, in organisations where there is a strong imbalance of power between employees and management and where there are no structures in place to enable voice to be exercised, or where voices are not heard or are ignored, the expression of voice is discouraged (Wilkinson et al., 2018).

Cultural aspects relate to workplace values and the nature of relationships. For instance, open and supportive work relationships are important (Ramchandani & Singh, 2020), especially with supervisors (Kwon et al., 2016; Milliken et al., 2003), not least because they help to create a collective belief in the safety and efficacy of speaking up (Morrison, 2011). Furthermore, in cultures with high levels of organizational trust, voicing problems and related needs is encouraged (Ramchandani & Singh, 2020), whereas in anonymous organizational settings and low levels of confidentiality, voicing one's opinion is discouraged (Almeida et al., 2020). This may also be related to cultural values such as power distance, as employees with high power distance values are more likely not to voice their concerns (Kwon et al., 2016).

2.1 | E-voice in the digital age

Digitalisation of workplaces has changed how people interact and communicate with each other (Holland et al., 2019; Martin et al., 2015; Mennie, 2015) and therefore, need to be considered when examining employee voice. New forms and channels of employee voice emerge through electronic tools such as social media, which Madsen (2017) defines

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as a 'user-friendly and visible web-based communication arena inside an organisation in which co-workers and managers can communicate, interact, connect, and make sense of their work and organizational life' (p. 3). E-voice describes how employees raise issues, contribute solutions, and participate in decision-making through such electronic communication tools, which include not only social media, but also other channels such as chat rooms, email, or online surveys (cf. Greer, 2002). To date, however, research on e-voice is still in its infancy; in particular more critical perspectives that not only highlight the benefits of new technologies, but also scrutinise the downsides, are rare (Balnave et al., 2014).

Indeed, previous studies show that digital tools can improve employee engagement in decision-making processes and open up the potential for more e-voices, for example, through lower costs of reproducing and disseminating information (DiMaggio et al., 2001), easier and immediate access, and sometimes anonymous participation (Balnave et al., 2014; Holland et al., 2019; Klaas et al., 2012; Martin et al., 2015). Furthermore, the use of social media invites people to act out one's 'desire to share about one-self' (Kairam et al., 2012, p. 1070). Employees can showcase their knowledge, experiences, and emotions to gain appreciation, a sense of belonging, and visibility. However, digital tools clearly have drawbacks and individuals' ability to use these technologies varies. Societies face a digital divide determined by people's access to technology, the extent and quality of their use, and their technical abilities (DiMaggio et al., 2001, 2004; Warschauer, 2003). This can lead to social injustice, unequal distribution of power, privacy, and security concerns (Afzalan & Muller, 2018).

2.2 | Voice in the context of alternative organisations

The notion 'alternative organisation' is often used as an umbrella term covering various kinds of organisations, such as collectives, worker or consumer co-operatives, community initiatives, or social movements. Despite varying purposes, these organisations are united in their goal to organise 'capitalism in a more humane way, with greater attention to social, economic, and environmental sustainability of organizations[, not fitting] in the traditional corporate, for-profit model' (Barin Cruz et al., 2017, p. 322f., see also Webb & Chenney, 2014). To further define the alternative organisation, Cheney (2014) elaborated five principles (see also Reedy & Learmonth, 2009): (1) autonomy, (2) equality/equity, (3) participation and democracy, (4) solidarity and connection, and (5) responsibility for implementing policies and practices consistent with these values. In addition, Parker et al. (2014) emphasise the need to take responsibility for the future and minimise negative impacts on the external environment.

In their effort to implement and bring these principles to life, alternative organisations aim to create a space where all individuals are seen as equals, are free to express their opinions, and are given the opportunity to participate in decision-making. Hence, the concept of voice is inextricably linked to the values underlying alternative organisations. However, instead of the concept of employee voice, the literature on alternative organisations seems to more often use other but related concepts, such as participation, engagement, involvement, and empowerment (Mowbray et al., 2015; Wilkinson & Fay, 2011). For instance, Ramchandani and Singh (2020) provide a conceptual framework for employee-centred organisations, in which they highlight the drivers and consequences of employee engagement, empowerment, and enablement. Furthermore, in their study of a consumer co-operative, Barros and Michaud (2020) 'highlight how social media can offer a new space for debates, dissensus, and critical deconstruction' (p. 578); members not physically present were enabled to e-voice their opinions through the use of blogs and social platforms. In contrast, Agarwal et al. (2014), in their study on grassroots organising in the digital age, also point to the downsides of using social media, noting that users tend to communicate face-to-face, experiencing bonds of trust, rather than using the tools available.

In any case, researchers have argued that alternative organisations cannot be idealised per se (see also Cheney, 2014). In the absence of formal hierarchies in alternative organisations, certain individuals may informally set themselves apart depending on their capacity, resources, and incentives (Ansell & Gash, 2007), thus promoting,

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or at least not preventing, power imbalances. Similarly, in Long's (1981) study of employee participation in ownership and decision-making, little desires for worker participation and influence were found at any level of decision-making.

3 | METHODS

We deemed a single-case study design appropriate because it allowed us to examine the phenomenon under study holistically and in-depth in its real-world context using multiple data sources (Piekkari & Welch, 2017). We adopted an interpretive, social constructivist perspective, that is, we searched for the meanings that study participants attach to their subjective social reality (Arino et al., 2016) and explored the facilitators and barriers to e-voice as perceived by Premium's members in the specific organizational context of a collective. Premium was chosen as a case for two reasons: First, the means of communication are almost entirely digital and therefore provide a rich environment for the study of electronic voice. Second, the organizational forms here are more participatory than in conventional organisations, which raises the question of whether this also implies more promising organizational conditions for the expression of e-voice.

3.1 | The case: Premium collective

Hirschman (1970) distinguishes between customers' voice and exit, by referring to voicing concerns or exiting by not buying or consuming the product. Interestingly, this mirrors what happened to the founder of Premium in 1999: He was disappointed because the taste of his favourite coke was changed, and he did not have the opportunity to have a say and voice his dissatisfaction. His reaction was not only exit by no longer consuming the product, but also by starting a new beverage brand. He founded the collective Premium in 2001 in Germany. Formally, he owns the brand and bears the business risk, but he equally collaborates with freelancers, who all work together to build the collective and define its values and goals. Members of the collective want to manage things differently and better than typical business organisations. In particular, Premium aims to demonstrate that moral and business motives do not contradict each other but can be integrated by focussing equally on the triad of ecological, economic, and social principles (Knoch, 2019). Since late 2004, the collective has been self-sustaining but does not seek to maximise profits. For instance, due to ecological reasons their products are only distributed in Germany, Austria, and Switzerland. At the same time, they are transparent about their organising model to allow organisations in other countries to imitate it.

Furthermore, Premium's members—including the founder—envision a collective where all stakeholders have an equal say, whether they are in sales, accounting, marketing, retailing, bottling, or simply consuming the product. In 2019, this included 1700 business partners and about 10,000 consumers (Edinger-Schons et al., 2019; Knoch, 2019). All stakeholders are treated fairly, this involves, for example, a decent equal pay for working members (including the founder), an adequate payment for orders, or avoiding unnecessary costs for customers (Edinger-Schons et al., 2019; Knoch, 2019).

The collective is managed by all interested members. The core management group is the so-called organising team, which consists of about 9–12 people, including the founder. They do tasks like accounting, sales, marketing, public relations, communication, and managing (regional) areas. About 30–50 members work as speakers meaning they are responsible for the customer service in a particular city or geographic area. The first contacts in the collective for these speakers are the regional managers, who are responsible for a broader region. Another group takes on supra-regional work tasks such as IT, communication, presentations, workshops, and (special) projects. Finally, 'production, logistics, and retail are done by independent professionals as regular contractors (with the right to participate in decision-making on an equal footing)' (Premium, 2022, February 2).

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Premium lacks formal HR structures, that is, they do not have systematic information about their members, nor recruitment, or performance appraisal processes. They work without fixed positions and free choices of place, time, and scope of work without providing offices (Knoch, 2019). Because of this decentralisation, Premium is a thoroughly digitalised workplace, meaning that most communication and decision-making takes place online via the 'Board'. This is an internal digital communication channel in the form of a forum with currently about 150 members, to which access is granted after an individual request by email (Knoch, 2019).

The most striking characteristic of Premium is its non-hierarchical 'consensus democracy', that is, all members can participate equally in the decision-making process in the Board by joining a discussion, suggesting a resolution proposal, and agreeing to it or voicing a veto (Premium, 2021, July 4). Hence, Premium can be characterised as an alternative organisation in the sense that its value statements are consistent with the principles described in the literature, such as autonomy, participation, solidarity, and responsibility for the social and natural environment around them. Participants not only strive to implement and live these values within this organisation but are also on a mission to further 'spread a fair, ecological, and socially sustainable business model of high-quality' (Premium, 2021, July 4).

For its particular form of organisation, Premium is receiving attention from the scientific community. As part of their mission to spread their business model, Premium's members willingly share insights into their organizational life and regularly participate in studies, for example, on conflict management (Husemann et al., 2015), sustainability and growth critique (Pohler, 2019), or market entry strategies (Ladstaetter-Fussenegger & Luedicke, 2013). A prominent example that is particularly relevant to this study, is an investigation by Luedicke et al. (2017) who examine 'the practices and outcomes of radically open strategising' (p. 2). They show how Premium's members cope with arising challenges such as information asymmetries and overload, and power asymmetries by bypassing the open principles. The authors identify a 'selective use of [less] open [and partially contradictory] strategising opportunities' (p. 2), such as authoritative decision-making, in which 'one person decides on an issue' (p. 40), rather than following the consensus principle.

3.2 | Data collection

Data sources include a survey and interviews. To understand Premium's organizational context, we first emailed an online questionnaire to members. The main objective was to get an overview of demographic characteristics, type of involvement, work responsibilities, and influence on decision-making. Within a month, 36% (54) of the members voluntarily participated in the survey. Since Premium does not systematically collect such information, this was a necessary first step in obtaining an overview of the case, developing our interview guide, and selecting interview participants.

In a second step, we conducted 20 in-depth, semi-structured interviews with different members of the collective, taking care of a balanced gender participation. In Table 1, we indicate the main role of each interviewee in the organisation and specify a code that we use as a reference for interviewee quotes in the findings section. Some interviewees were recruited through a post in the online forum, others through emails, or a snowballing process. The interviews lasted on average about 80 min and were conducted by telephone in German. Each interview partner was assured of data protection and confidentiality.

The interview guide was used flexibly, it included sections on the personal background of the interviewees, on (digital) forms of communication, human resource practices, for example, recruitment, development, work organisation, leadership, and decision-making, as well as on practices and perceptions around inclusion (partly inspired by Danowitz et al., 2012).

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TABLE 1 Overview of interview participants main role(s)

Interviewee code	Interviewee's main role(s)
I01	Organising team member
I02	Organising team member
I03	Organising team member
I04	Organising team member
I05	Organising team member
I06	Organising team member
I07	Speaker
I08	Speaker, supra-regional tasks
I09	Organising team member
I10	Speaker, reseller
I11	Speaker
I12	Regional manager, speaker
I13	Supra-regional tasks, former organising team member
I14	Consumer, former speaker
I15	Consumer, former supra-regional tasks
I16	Management of supra-regional tasks
I17	Management of supra-regional tasks
I18	Consumer
I19	Consumer
I20	Consumer

3.3 | Data analysis

To facilitate a comprehensive and in-depth analysis while providing a rigorous, structured, and transparent account of our data, we use the so-called Gioia methodology (Gioia et al., 2012), which is rooted in the grounded theory tradition (Glaser & Strauss, 1967; Lincoln & Guba, 1985; Strauss & Corbin, 1998). All interviews were recorded, transcribed, and imported into NVivo software for coding. First, we began the analysis with open coding (Strauss & Corbin, 1998) with the goal of closely following the interviewees' wording to appropriately capture their subjective perceptions and descriptions of situations in which they were (un)able to express their voice, resulting in 270 first-order codes (Strauss & Corbin, 1998). Second, inspired by theoretical concepts, for example, shared beliefs about voice (cf. Morrison, 2011; Morrison et al., 2011), open and supportive work relations (Milliken et al., 2003; Ramchandani & Singh, 2020), or information overload (cf. Luedicke et al., 2017), we discovered similarities between the codes through axial coding and grouped them into six more abstract second-order themes (Strauss & Corbin, 1998). Finally, we categorised the second-order themes into two aggregate dimensions that distinguish between contextual facilitators and barriers to e-voice (see Figure 1).

4 | FINDINGS

In this section, we present and explain the identified second-order themes along our aggregate dimensions: (1) contextual facilitators and (2) contextual barriers to e-voice.

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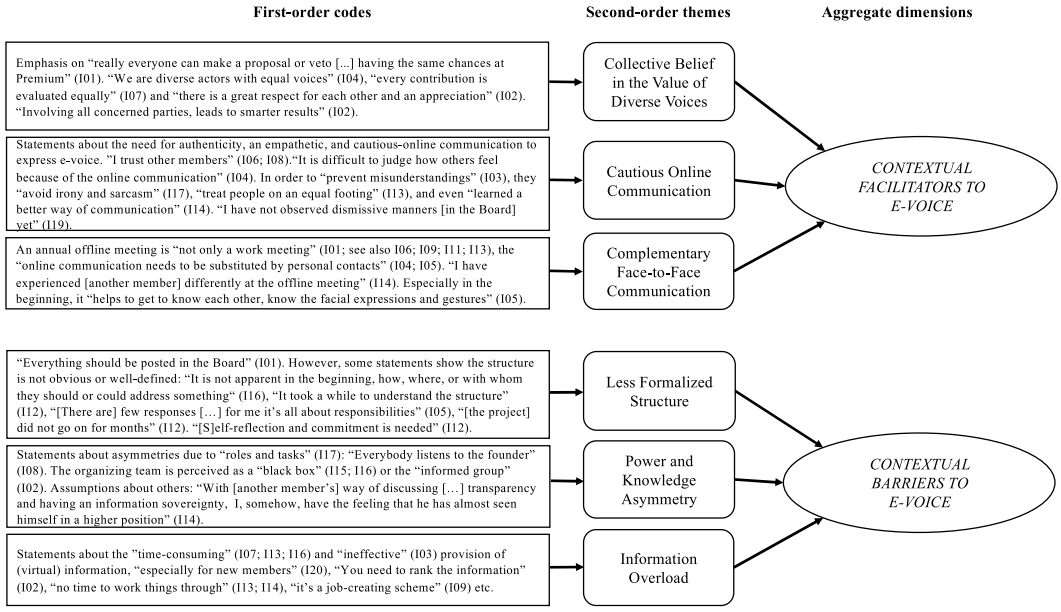

FIGURE 1 Data structure

4.1 | Contextual facilitators to e-voice

4.1.1 | Collective belief in the value of diverse voices

Premium members value voices of all concerned parties as a 'competitive advantage' (I02). 'Swarm knowledge' (I06) or 'collective intelligence' (I06) is seen as crucial for decision-making. In that sense, Premium counts on the support of all its different members to find the best solution:

> I think that individuals gain power through consensus democracy. [...] The most important thing – and what people need to learn – is to apply it generously. However, saying I trust you or I see things differently is not in itself a bad thing. If it's important to you, do it. This generosity is underestimated; it's not about imposing your individual opinion, [...] but rather about finding [collectively] the best, most intelligent, or most thoughtful solution. But also, openness, allowing everyone to voice their opinion is not only okay, it's good. [...] And finally the responsibility [...] if I know something important, I have to participate (I04).

Furthermore, critical voices are heard and considered fruitful, even if this is sometimes disappointing for the individual who made a proposal in the first place, as the following quote shows:

> I made a suggestion, [someone voiced] a veto [...] I was kind of demotivated to go on. I did not pursue it further, but I realized that it was plausible and that further steps were needed before certain ideas could actually become a resolution proposal [...] We actually discuss why there is a veto in the first place, what does not fit there and what perspective is brought in, and to what extent it is justified (I12).

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Moreover, members are very accepting and tolerant of people's differences, diverse perspectives, and possible conflicts. One interviewee points out:

> You can be a tiring or annoying person, have a different opinion, be sick, do a bad job, make mistakes or all at the same time. You can criticise the founder, have a controversy with him, but all this is not a problem (I02).

It appears that the collective shares the belief that the voices of different members are valuable and based on tolerance and trust. The virtual decision-making culture is perceived as something special that offers many opportunities to raise one's voice.

4.1.2 | Cautious online communication

Since most of the communication at Premium takes place online, members are very mindful when it comes to their use of language. One respondent admitted to being impressed by the 'quality of the discussions' (I08). Another said one can 'learn a lot about communication' (I14). Communication is perceived as 'very mindful, respectful, thoughtful, approachable, engaging, [and] inclusive' (I04). To avoid misunderstandings through virtual and written communication, participants are empathetic and careful:

> I try to avoid irony and sarcasm because I know it's very difficult to convey and take back online. I try to write very neutrally (I17).

Voicing needs and acknowledging them is seen as less problematic in Premium (I01) because it is handled proactively, for example, (virtual) meetings always start with a sensitivity-round to express members' feelings and needs (I02m; I03).

> How are the people? What's going on privately that they want to talk about? How is their health? How is everyone doing? [...] We want to acknowledge that when people open up (I02).

Indeed, this is also related to Premium's understanding of leadership, namely, to provide direction and create a safe space, as one of the organising team members points out:

> What I have to do is to create a big safe space where everybody who is somehow involved with us feels safe to move and develop freely. And so can speak their honest mind. (I02).

These quotes support the perception of most interviewees that the climate is indeed rather peaceful (I01) and conducive to e-voice.

4.1.3 | Complementary face-to-face communication

While virtual communication is the norm, it became clear throughout the interview process that face-to-face communication is sparse but an important complement. Premium organizes an annual 'offline meeting' for all members that is 'not just a work meeting' (I01), 'it has a bit of a happening character' (I17) where they get to know each other (I09; I11). 'Meeting in person at some point helps to understand [each other's online communication] better. That's why offline meetings are important' (I11).

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Some members of the collective may prefer to work mostly alone (I02; I11), while others see a 'deficit in not having social contacts [...] to build a collegial relationship' (I08). This quote illustrates the importance of additional face-to-face contacts:

> Maybe I am too sensitive, but if I did not know a person and only communicated with them by mail, especially at the beginning, [...] I would not have felt understood. [...] How people react to different topics, I think I can only judge if I know the people and so I think it only works well if I have the opportunity to get to know the people beforehand (I05).

Furthermore, it seems to be helpful to have personal contacts to address certain issues such as individual interests or needs (I10). However, some participants also prefer to share new ideas with their peer group before voicing them in the collective:

> I would do that first with the orga[nizing] team to check it out and then if they say, yeah, that's interesting, ask in the Board or get more opinions or something, I will do that. But the first impulse, I think I would always discuss it first with the people I already know (I05).

It becomes evident that many members of Premium need complementary face-to-face communication to facilitate e-voice.

4.2 | Contextual barriers to e-voice

4.2.1 | Less formalised structure

The collective is aware that because of its virtual and decentralised structure that is little formalised, its members risk working in solitude (I06). Since Premium has neither an office nor regular working hours, it is sometimes difficult to reach someone quickly (I02) because as one interviewee states: 'I work from home or wherever I want' (I01). The collective lacks binding structures, sometimes resulting in non-decisions (I16), unfinished tasks (I12) or longer project durations (I16). Waiting for online responses, answers or feedback is demotivating and hindering, as one respondent describes as follows:

> No, it's not quite that simple at Premium. I have raised [an issue] first, suggested [a solution] and offered to do that. But then things kept fizzling out, for one reason or another. There were concerns. And that was pretty exhausting, just the fact that I first brought [my project] up almost four years ago [...] and I finally completed it in June. So, it had a project duration of over three and a half years (I16).

Another interviewee underlines, '[There] are only a few responses [...] for me it's about responsibility [...] I feel like only five to ten people kind of participate in the forum' (I05). Premium's principles of autonomy and absence of hierarchy allow members to speak up or remain silent in discussions whenever they want, that is, there are no formal mechanisms obliging people to contribute and use the information in the Board for their work tasks and related decisions. Therefore, less formalised structures shift much of the responsibility to the individual and limit e-voices addressed to the collective, as problems are usually solved single-handedly.

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4.2.2 | Power and knowledge asymmetry

Premium members value equality among themselves. However, most interviewees point to informal hierarchies that arise from the way Premium is organised. First, according to one interviewee, a 'big problem is the perceived separation between the organising team and the rest of the collective' (I03). Their work is sometimes perceived as 'non-transparent and anti-collective [...] if shared at all' (I14).

Secondly, information, consultation and collective decision-making are supposed to take place virtually, where they are visible and accessible to all members. Therefore, 'everything in the Board is supposed to be made public' (I06). However, this is not done consistently, leading to a 'knowledge hierarchy' (I13; I11), as the following quote shows: 'The collective partly does not know what decisions are made at the top and therefore cannot say: "We want to have a say in this decision"' (I15).

Third, the founder is the central figure of the collective, 'he holds the strings' (I16) and can unintentionally silence other participants. One interviewee explains his role:

> Even if he does not want to, he plays a central role. And he's the one who is seen a lot [inside and] outside the collective, and he has this alpha role because of his charisma and his demeanour. And so, a lot of people look to him and say, okay, I'll do it, if he thinks it's good, I think it's good. I can imagine [...] some people feel like they are being overshadowed (I07).

According to some interviewees, the founder's voice has more power than others, not based on formal power structures, but as informal power that has grown over time, as the following quote shows:

> His voice is often of great importance, because he is the founder and the one who really bases his whole life on it. [...] He's particularly affected by everything, of course, and so if he were to say, 'I definitely do not want it one way or the other,' that would shorten the discussions (I17).

These quotes suggest that despite the principle of equal dignity, there are power and knowledge asymmetries within the collective, that unintentionally give more weight to the e-voices of some members and silence others.

4.2.3 | Information overload

New members with 'previous damage from other organisations' (I02) need some time to get used to this non-hierarchical, participatory decision-making style. Some interviewees address related disadvantages of autonomy: 'If everyone can do what they want, it is often time-consuming to make appointments' (I01). One interviewee is aware of the costs that can be associated with democratic decision-making, and expressed concerns about efficiency in achieving business goals:

> But sometimes [...] lay people express their opinions [on certain subjects], which I, as an expert [in this field], find impossible. [And the coordination loops] are a hindrance. [...] It costs me twice as much time, twice as much energy, and that's effectively money. [...] Consensus decisions cost a bunch of money and a bunch of time [...] but still it worked for 18 years (I03).

Moreover, interviewees stress that it is very time-consuming to read all the Board discussions (I14), and therefore members report some fatigue in expressing their voices electronically because they lack the time to deal with the details of each discussion and/or explain their own views (I13; I17).

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Similarly, others feel the urge to prioritise their work tasks and therefore do not have time to engage in time-consuming Board discussions, as the following quote shows:

> I rarely consulted the Board. I found it difficult because I had a lot of tasks. I felt that I never get my work done and that I lack the time to discuss things in the Board (I13).

Hence, information overload and time-consuming participation processes in the digital sphere may reduce Premium members' readiness for e-voice.

5 | DISCUSSION

In this study, we examined contextual factors that facilitate or hinder e-voice in the specific context of a highly digitalised alternative organisation. Echoing others (Ansell & Gash, 2007; Cheney, 2014), we show that well-meant practices in alternative organisations not always turn out as intended. While various aspects such as collective belief in the value of diverse voices or the very careful and thoughtful online communication style of members of the collective do indeed facilitate the expression of e-voice, barriers such as less formalised procedures or power and knowledge asymmetries coexist and can limit people's ability and willingness to voice their concerns via digital tools. How these tensions coexist is illustrated in Figure 2. In what follows, we discuss the theoretical and practical implications of our study, as well as its limitations and future research opportunities.

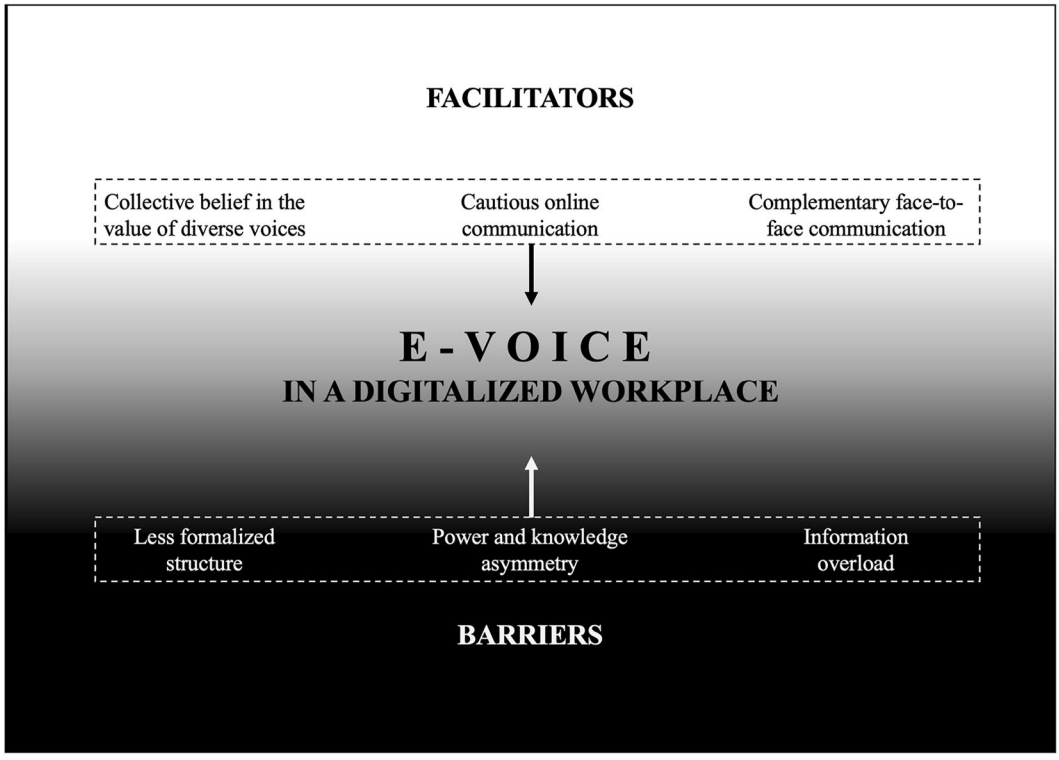

FIGURE 2 Contextual facilitators and barriers to e-voice in a digitalised workplace

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5.1 | Theoretical implications

The findings of the study show that some of the contextual factors identified in the broader literature on employee voice are also relevant in a digital context, while some require expansion and/or specification. For example, researchers have highlighted that shared beliefs about voice are important, for example, about the safety of voice and its effectiveness (Morrison, 2011). Following and extending this line of thought (cf. Morrison et al., 2011), our findings show that the collective belief in the value of diverse voices is indeed an important prerequisite for the expression of e-voice. The Premium Board is the main electronic communication channel through which members have the opportunity to participate in discussions and make suggestions, and our results suggest that an authentic appreciation of different voices, including critical voices, is key to encouraging participation.

Moreover, we show the crucial role of cautious online communication for e-voice. While the voice literature broadly suggests that fostering an open and supportive working relationship is an important factor in establishing voice (Ramchandani & Singh, 2020), we show in this study how this translates to the digital sphere. Premium members demonstrate a high degree of critical self-reflection about their own actions and are aware that virtual communication, in part with people they may not know personally, requires particularly sensitive and compassionate online interaction. At the same time, our findings extend previous research on alternative organisations that emphasise the importance of face-to-face communication (cf. Agarwal et al., 2014) by showing that additional personal contact and relationship building beyond the digital space are crucial to triggering the expression of e-voice. This is also consistent with previous studies in the employee voice literature that suggest that low levels of confidentiality discourage voice (Almeida et al., 2020), but contrasts with the emerging e-voice literature that points to the opportunities for more open, yet provocative, expression of voice in an anonymous online environment (Martin et al., 2015).

Regarding the barriers to e-voice identified in this study, we found that, for example, less formalised structures that shift a lot of responsibility to individuals and do not hold people accountable can limit the motivation to engage in discussions via digital tools. This lack of accountability and standardized procedures can also lead to ignored or unread e-voices in the Board, resulting in frustrating, slow, and time-consuming coordination processes. This echoes the findings of Wilkinson et al. (2018), who highlight that voices sometimes go unheard, not because of deliberate suppression of voices, but because of 'institutional noise' (p. 714). Our findings suggest that such institutional noise can arise from a lack of formalisation, but also from information overload, that is, an unmanageable amount of information produced during the digital Board decision-making process. Previous research on e-voice suggests that actual participation in decision-making is enhanced by digital platforms, as they allow easier, immediate access to information and low costs (Balnave et al., 2014; Holland et al., 2019; Klaas et al., 2012; Martin et al., 2015), but our study points out the drawbacks of this phenomenon.

Our findings on e-voice barriers are also consistent with the literature on alternative organisations, which shows that informal hierarchies based on power and knowledge asymmetries persist even in alternative organisations and that certain actors, such as the founder, may informally demarcate themselves depending on their capacities and resources (Ansell & Gash, 2007). However, in the case of Premium, Luedicke et al. (2017) suggest that members actually accept the central role of the founder due to his 'self-sacrificing' (p. 23) behaviour and his (informal) power that has grown over time. Nevertheless, the other side of the coin is a lack of legitimacy for the voices of less powerful members (cf. Wilkinson et al., 2018), which limits their opportunities to be heard.

Finally, looking beyond the boundaries of the collective, the risk of reproducing inequalities in the digital sphere is high given the different resources people are endowed with (e.g., digital skills, equipment, support) and the background they are socialised in (e.g., migration background, gender, age) (DiMaggio et al., 2001, 2004). This has important implications for digitalised workplaces as the case of Premium highlights that many people may not be equipped with the necessary resources to access and work within such organisations.

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5.2 | Practical implications

Our study has several implications for HR managers and decision makers who want to foster an inclusive culture that allows employees to voice their concerns and ideas through digital tools. First, Premium's case demonstrates the importance of communicating carefully and thoughtfully, especially in an online environment where, for example, it would be advisable not use sarcasm because it can be easily misunderstood. Such a sensitive communication culture is rather typical of alternative organisations (e.g., Ansell & Gash, 2007; Parker et al., 2014) and could inspire other organisations to train their employees in self-reflective and constructive online communication. Second, we are currently witnessing the digitalisation of work being spurred at an unprecedented pace due to the Covid 19 pandemic, which is driving many workers around the world to work from home (DeSilver, 2020). Organisations need to respond to these changes and harness their potential, but also recognise and counteract the associated disadvantages. Our study suggests that digital communication alone is deficient, as people need additional face-to-face contact with their colleagues to build bonds of trust, discuss ideas and feel confident to contribute their thoughts in the digital sphere. Therefore, HR managers could organise social events or mentoring programs to ensure relationship building within and outside the digital space. Finally, organisations facing a lot of institutional noise, like the collective considered here, could counteract this by assigning roles and responsibilities more explicitly to improve accountability and ensure that e-voices are heard, and ideas are effectively put into practice.

5.2.1 | Limitations and future research

The uniqueness of our case study offers interesting insights into e-voice in alternative organisations but may raise questions about generalisability as Cheney (2014) highlights that some forms of alternative organisations are more context or domain specific. The landscape of alternative organisations is diverse and may include cooperatives in general or worker-owned, social movements, and other forms with various manifestations of the five principles described in the literature (Cheney, 2014; Reedy & Learmonth, 2009). However, we argue for the transferability of our findings to structurally equivalent contexts (Corley & Gioia, 2004). This may apply not only to alternative organisations, but also to more innovative firms that rely on participatory decision-making architectures and digital technologies. Investigating how different organizational characteristics or values affect the scope and depth of e-voice behaviour could be a fruitful future line of research, especially with a focus on currently under-researched e-voice mechanisms.

Furthermore, many of the previous studies on e-voice emphasise the benefits of digitalisation (Balnave et al., 2014), but more critical studies are needed to understand the associated drawbacks. The contextual factors identified in this study could be used as a starting point for larger survey studies to test, extend and refine. Another potential avenue for future research could involve the voices of marginalised groups (e.g., gender, race, or sexuality) that are often 'ignored, suppressed, or missing' (Syed, 2014). Digital tools may reinforce or mitigate such marginalisation; for example, dismissive tendencies in anonymous virtual communication may be avoided if gender is obfuscated.

6 | CONCLUSION

This study addresses contextual facilitators and barriers to e-voice in the digitalised workplace of a German collective. We show that a collective belief in the value of diverse voices is particularly important in the digital sphere, that awareness and self-reflection are necessary for careful online communication, and that complementary face-to-face communication facilitates the expression of e-voice. At the same time, we propose that e-voices are inhibited by institutional noise that arises from less formalised work structures and information overload as well as by (unintentional) informal hierarchies based on power and knowledge asymmetries. Overall, this study contributes to employee voice

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theory and practice by providing a better understanding of the conditions under which e-voicing occurs, but also highlights the tensions that arise when well-intentioned participatory decision-making structures are implemented in a digital sphere.

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CONFLICT OF INTEREST

The authors declare that they have no conflict of interest.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are not publicly available due to anonymity reasons but are available from the corresponding author on reasonable request and with permission of Premium.

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RESEARCH ARTICLE

To telework or not to telework: Does the macro context matter? A signalling theory analysis of employee interpretations of telework in times of turbulence

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Abstract

How do workers make sense of telework and respond to it in turbulent times? This study of a consultancy firm in Spain, during the 2008 financial crisis, explores employee interpretations of telework in the context of major macro-economic disruption. We draw on signalling theory to consider telework as a signal sent by the organisation and argue that the environment in which the signal occurs changes employees' interpretations. While telework is generally understood as an employee-centred practice, we find that in an economic crisis it is also interpreted as a potential threat for employees. Therefore, the meaning of telework is not predetermined, but continually shaped socially considering events beyond the boundaries of the firm. We propose adopting a social constructivist view to consider human resource (HR) practices as objects experienced and interpreted within their wider social contexts. We shed new light on signalling theory and HR studies by offering insights on the relevance of the signalling environment for interpreting messages, and bring forth the concept of "external fit".

Abbreviations: EU, European Union; HR, Human Resources; TW, Telework; UK, United Kingdom.

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KEYWORDS
crisis, flexible working arrangements, signalling theory, telework

Practitioner notes

What is currently known

- Telework is not uniformly experienced as something positive or negative by employees.
- The context in which teleworking unfolds is under-explored in prior research.

How this paper adds to current knowledge

- We examine how employees make sense of and respond to telework in a turbulent context.
- We bring forth the concept of "external fit" to explain how the environment plays a role in employee interpretations of telework.

Practical implications

- Firms need to analyse the environment to understand how messages are interpreted.
- Firms need to consider the signals embedded in their environment and to align them with the signals they send through their HR practices.

1 | INTRODUCTION

Although not a new phenomenon, the relevance of telework increased for decades, propelled by technological development. In the UK, the labour force working mainly from home increased by 80% in 2 decades (CIPD, 2020). In the European Union (EU), people partly working from home increased from 5.2% to 9% in the 2010s (Eurostat, 2020). In 2020, amid the COVID-19 pandemic, teleworking became the norm. EU countries such as Spain and Italy, in which less than 5% of workers could telework in 2019, reached 32% and 45% respectively in April 2020.

This surge sparked interest in the consequences of telework. Firms have promoted telework to improve their image and reduce office costs (Bloom et al., 2015). Individually, employees have greater autonomy (Gajendran et al., 2015) and work–life balance (Hill et al., 2001), less stress and higher job satisfaction (Gajendran & Harrison, 2007) among other positive outcomes. However, the literature also unveils factors promoting negative perspectives of telework, such as reduced promotion opportunities (Bloom et al., 2015), well-being (Song & Gao, 2020), and social isolation (Collins et al., 2016).

Evidence suggests that telework is not uniformly experienced as something positive or negative (Boell et al., 2016). The literature highlights gaps between human resource (HR) practices and workers' lived experiences (Bowen & Ostroff, 2004), which depend on employees' idiosyncratic understandings of the practices (Cañibano, 2019). While numerous studies look at teleworking consequences for people and organisations (e.g. Bloom et al., 2015; Lautsch et al., 2009), few delve into the workers' conceptualizations and interpretations (e.g. Bathini & Kandathil, 2019; Gálvez et al., 2020; Mustafa & Gold, 2013). More research is needed to explore how individuals make sense of telework.

An additional under-explored element is the context in which teleworking unfolds. Factors enabling or hindering people deciding to telework are mainly micro-level (e.g. job-related, personal, or spatial) (Vilhelmson & Thulin, 2016). Yet, macro-level factors, such as economic uncertainty, also influence individual experiences at work (Psychogios & Prouska, 2019; Zagelmeyer & Gollan, 2012). The 2008 crisis had a significant impact in workers' lives, affecting work arrangements, pay and conditions (Psychogios et al., 2019). However, little is known about the extent to which

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uncertainty played a role in shaping workers' understandings of telework. Without this knowledge, it is difficult for organisations to design teleworking practices that improve workers' experiences.

To address these gaps, this paper investigates *how workers make sense of and respond to telework in the context of macro-level uncertainty and crisis*. We draw on signalling theory (Connelly et al., 2011; Spence, 1973) to consider telework as a signal sent by the organisation, whose interpretation by employees depends on the environment in which it is sent out. Our study focuses on a consultancy firm that implemented telework in 2008 in Spain, where the financial crisis had particularly deep effects (Eurofound, 2013).

2 | LITERATURE

The literature on telework mainly focuses on employee and firm implications of teleworking versus non-teleworking (e.g. Bloom et al., 2015; Gajendran et al., 2015) and on telework intensity (e.g. Golden et al., 2006; Lautsch et al., 2009).

The practice is associated with less stress (Raghuram & Wiesenfeld, 2004), reduced tiredness on weekdays (Song & Gao, 2020), less work–life conflict (Gajendran & Harrison, 2007), greater teamwork engagement (Felstead et al., 2002) and employee performance (Bloom et al., 2015). Meta-analytic evidence shows that telecommuting enhances task completion, productivity, and overall employee ratings (Gajendran & Harrison, 2007). These beneficial effects partly result from improved perceived autonomy (Gajendran & Harrison, 2007) and flexibility to manage job and family demands (Baruch, 2000). They may also be contingent on idiosyncratic characteristics or contextual factors. Performance effects appear to be higher for mothers (Sherman, 2020), contingent on the quality of the employee–supervisor relationship, whether teleworking is accepted (Gajendran et al., 2015), or on workers' preferences for integration or segmentation between work and life (Basile & Beauregard, 2021; Mustafa & Gold, 2013).

However, prior research also reports neutral and negative effects. Evidence shows a curvilinear link between telework intensity and job satisfaction, in which the latter appears to plateau at higher levels of telework (Golden & Veiga, 2005). Another study reveals that teleworkers experience more stress relative to working in the office (Song & Gao, 2020) and lack support from the organisation (Jaakson & Kallaste, 2010). Telework can also increase work–family conflict if boundaries become blurred (Breaugh & Frye, 2008), intensify work (Avgoustaki & Bessa, 2019; Bathini & Kandathil, 2019; Kelliher & Anderson, 2010), impede salary growth or promotion rates (Bloom et al., 2015) and impose a burden on office co-workers who have to adjust their tasks and responsibilities (Gajendran & Harrison, 2007).

This discrepancy in the results can be attributed to whether employees experience telework as something positive or negative, and depends on how they make sense of the practice. Employees' understandings of flexible working play a key role in their unfolding (Cañibano, 2019). HR practices send continuous messages that are idiosyncratically processed, whereby two workers' interpretations of the same practice may diverge (Bowen & Ostroff, 2004). However, few studies examine individuals' own interpretations of flexible working (Bathini & Kandathil, 2019; Gálvez et al., 2020). This is problematic because employees' understandings of telework evolve. A field experiment by Bloom et al. (2015) indicates that although employees initially liked teleworking, a few months after its implementation they changed their minds, reporting feelings of isolation and fear of reduced career advancement. This change in their understanding of telework is likely to shift the workforce's adherence to telework, and the outcomes of the practice.

Also, this sense-making process does not happen in a vacuum. The literature indicates that geographic and socio-economic features, culture and institutions (Peters et al., 2016; Raghuram et al., 2001), crises and natural disasters (Chong et al., 2020; Donnelly & Proctor-Thomson, 2015) may explain differences in telework implementation and dissemination. Nevertheless, it is still unclear whether and how these macro-level factors play a role in how individuals make sense of the practice. For example, we know that telework is more common in less-unionised contexts (Felstead et al., 2002) but we don't know whether employees in unionised environments understand telework in the same way. Similarly, we know that organisations introduce telework following extraordinarily disruptive events (e.g. COVID-19, 9/11, earthquakes) (Chong et al., 2020; Donnelly & Proctor-Thomson, 2015) and that its consequences

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might differ from those of regular telework (Wang et al., 2021; Çoban, 2022). Yet, little is known about how much these extraordinary events affect how employees make sense of telework.

This paper explores individual interpretations of telework in a macro-level turbulent environment, as evidence shows such environments are likely to shape individual work experiences (Zagelmeyer & Gollan, 2012). We focus on one particular turbulence that created high uncertainty and unprecedented job losses: the 2008 financial crisis (Prouska et al., 2016). The crisis affected workers at many different levels including their capacity to exercise their voice (Gollan & Perkins, 2010), and receive pay, benefits and training opportunities (Chatrakul Na Ayudhya et al., 2019). Specifically, we explore the question: does such an uncertain and turbulent macro-level environment shape employees' understandings of telework?

3 | SIGNALLING THEORY

We build on signalling theory, which explains the behaviours of actors who send signals to each other to palliate information asymmetry (Spence, 1973). Connelly et al. (2011) depict signalling theory as a timeline presenting an interaction between two parties who send and interpret signals over time. The *signaller* has valuable but imperceptible information for the receiver. They communicate this information to the receiver through a *signal*. The *receiver* decodes and interprets the signal transforming it into perceived meaning. Receivers may not interpret the signal as intended (Taj, 2016). The receiver's interpretation drives them to act, which sends the signaller *feedback*. This interaction takes place in a *signalling environment*, which is not neutral: it can introduce noise and affect the receiver's interpretation (Rynes et al., 1991).

Signalling theory is an underused lens to explore employee experiences of HR practices (Suazo et al., 2009). However, it can help unpack the process through which HR-designed practices become employee-lived experiences and explain the potential gaps between the two. Prior work uses signalling theory to argue that employers interpret employee use of telework as indicating lack of career focus (Bourdeau et al., 2019), which may shape employees' career success (Leslie et al., 2012). The theory was further used to suggest that telework is instead a signal sent by employers. Employees respond positively because they perceive that the employer cares about their welfare and work–life balance, leading to goal progress and higher engagement (Masuda et al., 2017).

Signalling theory is a helpful lens because instead of seeing telework as a stable HR practice, it enables exploring the practice as an individually interpreted message. How each worker decodes and interprets telework to make sense of it may vary. Different interpretations may coexist and evolve differently over time, in ways not always expected by those who designed the practice. A key premise underlying the theory is that how employees perceive the "signal" depends on the context in which it is provided. The environment can be key in shaping employees' understandings of organizational practices, which offers theoretical grounds to look at the influence of turbulent situations.

In sum, this paper draws on signalling theory to explore two interconnected research questions: *How do workers make sense of and respond to telework in a context of macro-level uncertainty and crisis? To what extent does context shape individual understandings of telework?*

4 | METHODS

Our study analyses the Spanish branch of an international consultancy firm. ConsultCo was a pioneering company in Spain, which in 2008 offered its employees the possibility to telework on a completely voluntary basis, a time when 94.5% of Spanish workers reported never having teleworked (Eurostat, 2020). Employees signed a formal arrangement to work from home one to 3 days per week, and an addendum was included in their contract. In parallel, informal arrangements arose between some supervisors and employees whereby the latter could also telework without the contractual boundaries of formal arrangements.

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The study took place during the 2008 financial crisis, which had tremendous impact on the Spanish economy. Spain, like other southern countries, implemented the largest austerity cuts in Europe (Chatrakul Na Ayudhya et al., 2019). Unemployment climbed to a record high of 27.16% in 2013 and job quality deteriorated, affecting job security and the working environment (OECD, 2016).

The crisis also turned companies in Europe, and in Spain in particular, into hostile working places and made working conditions harder (Psychogios et al., 2014, 2019). Organisations downsized business functions, fired employees, froze contracts and recruitment, forced employees to unpaid overtime, reduced pay and bonuses (Prouska et al., 2016). Spain's National Institute of Safety and Hygiene at Work (INSHT) blamed the crisis, its ensued uncertainty and worsened working conditions for work intensification and increased employee mental health issues (INSHT, 2011). This impact of the crisis on employees provides a rich and unique setting to understand whether and how employee experiences and interpretations of telework are influenced by macro-level turbulences.

Our results were drawn from a wider study designed to examine flexible working. Here we present qualitative data from interviews conducted in 2010 and 2011 with teleworkers and non-teleworkers. The questions were open-ended so that informants would provide unprompted descriptions of their experiences. Questions covered the interviewees' organizational track record, their role and experiences of telework. We did not ask specific questions about the economic context, yet it emerged as a theme. Participants also provided demographic details. The sample in Table 1 includes 35 employees between 27 and 51 years old, from four professional categories doing knowledge-based work in strategy, management, finance, HR, IT, operations, research, and services. Fifteen served external and 20 served internal clients. Four were from the HR team in charge of formally implementing and disseminating telework across the organisation. Ten were formally teleworking, which involved systematically working from home one to 3 days per week. Ten participants had informal arrangements, meaning their weekly teleworking days varied. It was important to include their perspective because informal flexibility and formal arrangements generate different outcomes (de Menezes & Kelliher, 2017) and may be interpreted differently by workers. Fifteen participants did not telework. In presenting interview quotes we indicate: interview code (1–35), gender (F: female; M: male), whether they are part of the HR team, or the type of telework arrangement they have (HR: HR team member; FT: formal telework; IT: informal telework; NO: No telework) and number of children.

TABLE 1 Interviewee profile

Type of telework	Rank	Male	Female	Total
Formal		**4**	**6**	**10**
	Junior	2	2	4
	Specialist	1	1	2
	Manager	0	2	2
	Senior	1	1	2
Informal		**4**	**6**	**10**
	Junior	0	1	1
	Specialist	2	1	3
	Manager	0	1	1
	Senior	2	3	5
No telework		**6**	**9**	**15**
	Junior	1	1	2
	Specialist	2	1	3
	Manager	3	5	8
	Senior	0	2	2
Total		**14**	**21**	**35**

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We also analysed 18 documents (approximately 1000 pages) comprising company reports, HR policies and internal documentation from the two years prior to the interviews. These documents were key to understanding the signal the company wanted to send, how the first teleworking pilots emerged and how its implementation was disseminated.

The data analysis first followed an open coding logic (Charmaz, 2006), to unpack teleworking experiences described by different actors. Codes such as "teleworking as caring for employees" or "teleworking and job security" emerged from this initial coding phase. We continued selective and axial coding. The above codes were synthesised into themes explaining larger portions of data. For example, the codes "teleworking and job security" and "teleworking and career progress" were organised under a selective code "Unintended interpretation: Teleworking as a threat". Initial coding was conducted by the first author. The second author coded the data independently to alleviate potential biases. We then compared our coding, discussed differences, and clarified the categories (Miles & Huberman, 1994).

The coding process was iterative and intertwined with an ongoing literature review. This allowed to note that participants' accounts of telework as a threat were embedded in the economic context. Without prompting, participants mentioned the crisis and shared their concerns about working in this turbulent environment. Over time, we observed connections between the context and certain participants' understanding of telework. The iterative coding process led to creating a complete coding template (Table 2). The theory's key concepts were used to organise themes and make sense of their connections, but were not imposed on the data a priori. High-level codes such as "signal", "receiver", "feedback" and "signalling environment" were used to make sense of data that had already gone through a bottom-up coding logic.

5 | ANALYSIS

5.1 | The signaller and the signal

Document analyses provided information on the signal the organisation wanted to send through implementing telework. The section '*Flexibility and work–life balance*', in the company's 2009 annual report, stated the following:

> "We are aware that work–life balance is one of the areas of improvement in our industry. For this reason, we (…) offer a variety of initiatives and programmes that favour flexibility and enable each professional to strengthen the balance between their professional and personal lives. Among them, we may highlight the following: (…) Use of technologies to (…) facilitate working from home".

According to this report, working from home was intended as an employee-oriented practice. This message was reinforced in several other materials. The head of HR stated:

> "the firm has established different teleworking initiatives (…) If the firm asks the employee to put [in] effort, it is only appropriate that the firm gives something in exchange to show them that we value their effort" (Internal document for new recruits, 2009).

The organisation presented telework as a means to compensate for individual effort and show employees it cared. Additional documents suggested that with this signal, the firm sought to strengthen retention and employee engagement. In another document telework was listed as a practice intended to reinforce "individuals' emotional and intellectual commitment to the organisation" (HR training materials, 2009).

Interviews with the HR team provided further details on how the message was conveyed. One team member said telework was implemented because the company wanted to show responsiveness towards workforce needs.

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TABLE 2 Final coding template

1 Signal
1.1 Telework implemented to support employees
1.1.1 Encourage work–life balance
1.1.2 Value employee effort
1.1.3 Teleworking as caring for employees
1.2 Boundaries of the message
1.2.1 Uniqueness in context (pioneering)
1.2.2 Telework is a privilege
2 Receiver
2.1 Intended interpretation: Employee-centred practice/sign of support
2.1.1 Incentive & opportunity
2.1.2 Trust
2.1.3 Work–life balance
2.1.4 Telework is not a right
2.2 Unintended interpretation: Teleworking as a threat
2.2.1 TW & job security
2.2.2 TW & career progress
2.2.3 Out of sight out of mind
2.2.4 Outsourcing/Offshoring
3 Feedback
3.1 Total rejection of practice (no telework)
3.2 Partial rejection of practice (telework as little as possible)
3.3 Acceptance and adherence (telework regularly)
4 Signalling environment
4.1 Crisis (macro context)
4.1.1 Uncertainty
4.1.2 Instability
4.2 Culture (local context)
4.2.1 Spain
4.2.2 Presence-focused culture

> "Society is demanding a certain flexibility, it is demanding that we change the way we work, it is demanding that we balance personal and professional lives (…) The demand has come from society and then we are responding and adapting" (I14, F, HR, 0).

The message was also specific regarding the boundaries of telework. Emphasis was made that it was a special advantage the organisation was willing to grant rather than something employees were entitled to. An HR team member explained:

> "We consider telework as a privilege, not as a right. I give you this flexibility as a company but you need to consider that if, for any reason (…) you need to come in to work, that day you don't telework" (I2, F, HR, 0).

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Another pointed out how, in Spain, telework was a strong signal of organizational support and employee care:

> "Telework is something you do not have in other companies. Whether you like it or not is your thing, but it's there and it's a way to see or to demonstrate that the company wanted to implement it [telework] and that is because it cares about people" (I8, M, HR, 0).

Since few organisations were offering telework at the time, ConsultCo trusted employees would interpret it as a sign the firm was interested in their well-being and was willing to support them. A HR newsletter described the practice as "pioneering" in the Spanish context.

5.2 | Contradictory employee interpretations and reactions

Interviewees' accounts suggested employees' interpretations of telework were contradictory, with some observing telework as a sign of organizational support and others seeing it as a threat to their jobs and career prospects. Some employees appeared not to have interpreted the signal as intended by the organisation. This is visible through their explanations of why they decided whether or not to apply for telework. In general, those employees who saw flexibility as a sign of organizational support adhered to the practice either formally or informally. Whereas, those who saw telework as a threat, either rejected it and did not telework at all, or did so as little as possible.

5.2.1 | Telework as an employee-centred practice and a sign of organizational support

Eighteen employees interpreted telework as a perk. One interviewee explained:

> "Right now I am teleworking (…) and the truth is it is very motivating, (…) I feel supported, I feel they trust my work. They have demonstrated they don't need to be on top of me (…) I feel I matter to the firm, what I do matters" (I34, F, FT, 0).

Another described telework as a "wonderful opportunity we are offered to organise our lives in a more autonomous way" (17, F, IT, 3). These testimonies illustrate how the meaning some interviewees attached to telework was aligned with the organisation's intended message. Another interviewee said:

> "To me it is clear that this company cares about its employees. Take telework, for example, ok maybe it saves some cost (…) but it is thought mainly for us [employees], so that we don't have to commute and we can have some quieter days at home" (I9, M, FT, 0).

This is an example of how some employees interpreted telework as the company wanting to create a better and more supportive work situation for them. Another participant said:

> "I have no doubt that the company implements measures like this [telework] because it wants to help us in doing a better job, in feeling well and cared for and in having a life (…) It is a way to retain us" (I33, M, FT, 2).

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The extent to which some of the HR messages around telework got through to the employees is striking. Some interviewees repeated almost verbatim the limits of telework as presented by the HR team. A manager said:

> "We need to think that telework is not a right, it is a privilege and if at an important moment you need to come in the office the day you are supposed to telework, you just apply common sense (…) People have accepted well that this is not a right" (I10, F, IT, 2).

Another employee explained:

> "Telework has to be understood as a privilege, not as a right (…) That means when you need to be in the office, you come and that's it" (I32, F, IT, 0).

This suggests the signal was clearly received by some employees and interpreted as expected by the signaller. These individuals responded to the signal by applying to telework.

For some, this interpretation was reinforced by the fact that telework was uncommon in Spain at the time. One interviewee compared his situation with his wife's at a major law firm:

> "she does not need to be in the office. (…) she could work from home, but in her company no one, not even top executives, works from home (…) When my wife tells that I can telework they are wide-eyed with amazement because it has not gotten into their heads yet. It is a typical Spanish firm" (I20, M, IT, 2).

Indeed, some of the interviewees described the teleworking pilot as "amazing" or "incredible". A manager said:

> "at the beginning it seemed incredible, because I know that in other countries it has been running for a while (US, Nordics…) but in Spain it seemed incredible (…) I think the impact on satisfaction is huge if you can value what it means" (I10, F, IT, 2).

This suggests the message HR wanted to convey was strengthened by the paucity of teleworking opportunities present in Spain at that time, suggesting that the signalling environment played a role in how people made sense of the signal.

Employees who interpreted telework as a sign of support generally responded by adhering to the practice. Out of 18 interviewees holding this understanding of telework, 16 were teleworking, 7 formally and 9 informally. This type of understanding was more present among the most junior employees and the most senior. Juniors more often adhered to formal telework whereas seniors reported more informal telework, perhaps because they had gained their direct supervisor's trust over time and felt no need to formally apply when they already had informal access. The arrangement (formal or informal) did not seem to influence participants' understanding of telework. The two non-teleworkers interpreting telework as a sign of organizational support described working in the office by choice, to have a better working space, but still praised the organisation's interest in supporting its employees through this practice.

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5.2.2 | Telework as a threat

In contrast to the employee-centred interpretation, an unexpected understanding of telework emerged. Seventeen participants believed telework posed a threat to their career advancement or job security and that adhering to it would be an unnecessary risk. One participant said:

> "The way you motivate people in consulting is different. Normally you are more oriented towards your career (…), to make yourself indispensable… teleworking does not fit there because people want to get noticed to progress and for that you need to be there" (I5, M, NO, 1).

This illustrates how telework was sometimes understood as a practice that may hinder employees from achieving career progression. Other participants explained that this was the reason they decided not to telework or not to do it frequently. An interviewee said:

> "I have flexibility to work from home whenever I consider it opportune. I don't do it often because I like to be here (…) I need to be here and I think it is good for my career" (I24, F, IT, 0).

The idea of teleworkers being out of sight and out of mind was recurrent with employees highlighting the importance of being present. One said:

> "they can't oblige me [to telework] (…) nowadays, the office experience, the day to day is important (…) because you are seen and you see others and you are on top of things in a more agile way and this, in Spain and at this very moment in which the market is what it is, is not trivial" (I22, F, NO, 0).

Another interviewee described telework as an unworthy risk. He said:

> "Now with this awful context and how hard it is to sell projects, I think it is very important to be in the office so that people remember you and want to get you in their projects. If you stay home it is like they forget you exist and in these times, I think it is an unnecessary risk. It is also true that I don't need it" (I4, M, NO, 0).

Some participants went even further, understanding telework as a potential danger to their job security. One interviewee explained why she decided to only telework 1 day a week:

> "with the environment we have (…) I will do everything I can to keep the one [job] I have. (…) in this environment I feel that I need to prove myself more. For example, now that I can, I am teleworking but only once a week. Taking it stirred up doubts because this is not the right time to not be in the office. (…). If things get better and it is easier again to change companies, I might extend and telework more days" (I16, F, FT, 2).

Her understanding that telework might pose a threat to her being a keeper employee, drove her to request less teleworking than she would have wanted.

Another interviewee was even more candid about his fear of being let go when describing why he decided to come back to the office full time:

> "I realized I was disconnected. I felt out of everything and that is not good because you don't find out about things and because on a rainy day, in this country, it is sure that the boss won't get rid of the one

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> who is sitting in his chair beside him all the time, but the one he doesn't see, even if the one at home is more productive. I imagine things will change one day but, for now, the feeling I have is this is the way it is and I put my job on the line if I am not here at the heart of things, so I decided to come back and they didn't give any problems either" (I28, M, NO, 2).

Of the 17 employees interpreting telework as a threat, 13 did not telework. Their understanding of the practice made them reject it. This was particularly salient for individuals in middle career stages, holding managerial positions but who were not yet senior. Four participants had adhered to telework even if they saw it as a potential threat. Three were formally teleworking because they had children and needed to. However, all three described how they only teleworked 1 day per week to avoid potentially negative consequences. The only informal teleworker who depicted the practice as a threat also made as little use of the practice as possible. In sum, all individuals interpreting telework as a threat were wary of making use of the practice and most did not adhere to it.

5.3 | The signalling environment as a game changer

The signalling environment appeared to play a key role in employees interpreting telework as a potential threat, describing telework as embedded in "these times", "this environment", or "this awful context".

The crisis surfaced in the interviews as a source of uncertainty, which conditioned the participants' understandings of telework and drove them to reject the practice. One participant said:

> "I think work has intensified because of the crisis and the competition (…) People work more because they feel that they need to demonstrate their worth, that their job cannot be done someplace else with a lower cost. I think that this has partly slowed teleworking. People say, careful, if I do it [my job] at home maybe they think that it can be done by someone cheaper in another country" (I12, F, FT & IT, 1).

In her eyes, in a crisis, telework was connected to outsourcing, and adopting it posed a threat. The following quote shows how a manager believed some people may be making that same association:

> "What I have noticed is that people in Spain are a little reluctant to telework because some may think that if they work from home, the firm might decide that someone in Argentina can do their job cheaper. Since now with the crisis everything is about reducing costs" (I25, F, NO, 2).

This interpretation was due to turbulence and appeared to have developed only because of such context. Another said:

> "It's not like it's the right time to ask for telework (…) There is a lot of uncertainty about our jobs. Before the crisis employment stability was total, a 10, but now it's a 2–3. We don't know what is going to happen (…) At this moment I don't know if next month I'll be out of a job" (I29, F, NO, 2).

This quote suggests that, given the unstable situation generated by the crisis, the signal sent by HR that telework was a privilege, may actually lead to an interpretation opposed to what HR intended. If telework was indeed a privilege rather than a right, employees may be deterred from applying for it during a crisis, as they were concerned that requesting perks in times of difficulty may put their jobs and careers at risk.

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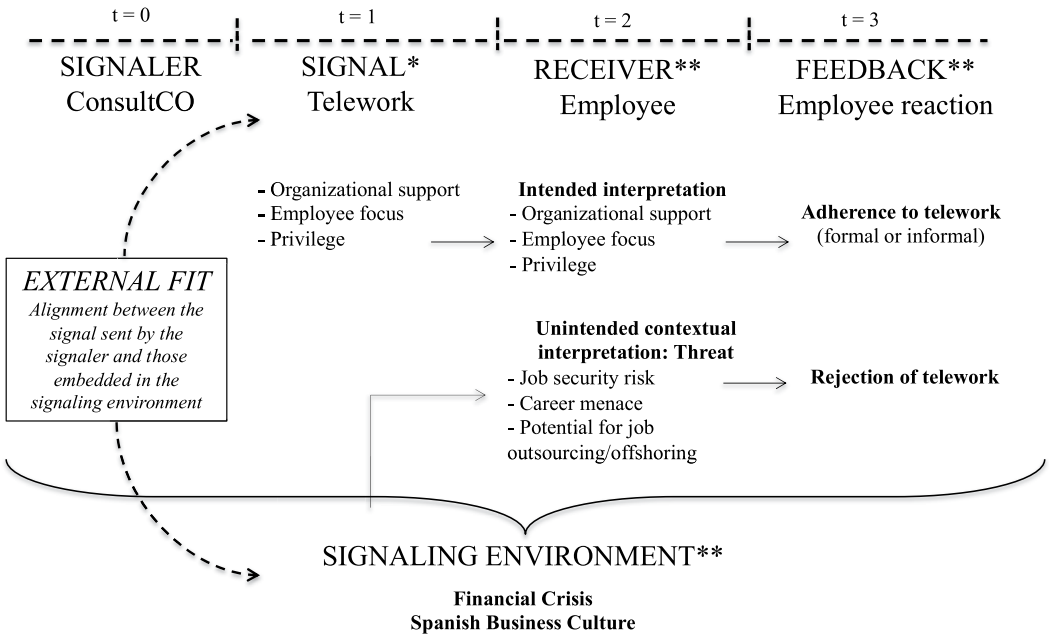
The Spanish business culture was also present in participants' discourses as another relevant aspect of the signalling environment. An employee stated:

> "I am not as affected by the crisis because I work with an international team. My boss is not in Spain (…) [she] teleworks, my teammates telework, I do too. (…) if I was part of a Spanish team I would most likely not telework even if I was allowed to because the managers here (…) if they have to choose between someone they see all the time and someone they rarely see, it is clear whom they would choose" (I6, M, FT, 1).

This participant highlighted how the context changed his interpretation and reaction to telework. In Spain, he would reject the practice he adhered to in an international context because he saw it as posing a threat. Such meaning was developed in light of context and the same person may interpret the practice differently in different situations. Figure 1 illustrates how the signalling timeline for teleworking at ConsultCo unfolded.

6 | DISCUSSION

Our analysis provides evidence that context is a space in which employees create meaning. The signals sent by organisations are not interpreted in a vacuum but translated within a social context in constant evolution. The meaning of telework is not predetermined, but continually shaped socially, in light of events that go beyond the firm's boundaries. Such meaning exceeds formal HR policies and practices (Cañibano, 2019). It is contextual and may vary even within the same organisation. The same practice may not be equally interpreted in a highly competitive industry than in an oligopoly or a monopoly. Regulations, unions, and labour market conditions are important contextual elements



* Emerged from the analysis of company documentation / ** Emerged from the analysis of interviews

FIGURE 1 Signalling timeline for teleworking at ConsultCo. *Source*: Adapted to the case of teleworking at ConsultCo from Connelly et al. (2011, p. 44)

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that may shift people's understandings of HR practices. For instance, providing private healthcare to employees in contexts with strong social security systems that would cover them anyway, may be interpreted as more supportive than providing healthcare where the employee would not be covered otherwise. In a dynamic labour market, in which companies compete for talent, training may be interpreted less as a sign of organizational support than it would in a slow market in which employees have difficulties changing jobs. Therefore, we can interrogate the ontological nature of any HR practice, going beyond their conceptualisation as just represented in policy documents. The practice and its experience are ontologically inseparable. This suggests the HR literature could benefit from adopting a social constructivist view to consider the development of practices as objects that are experienced and interpreted within their wider social contexts and cannot be understood if split from such context.

A novel aspect in our findings is that telework can be interpreted as a threat by employees; in accepting telework, they fear putting their careers and jobs at risk. This was particularly salient among participants holding managerial positions but who were not yet senior. These individuals were middle-aged and sought to progress to senior positions. This profile of employee is more sensitive to uncertainty and more vulnerable to job insecurity (Cheng & Chan, 2008). While some previous work suggests that telework may negatively affect promotion opportunities and career progress (Bloom et al., 2015), our study explains how employees could see the practice as a threat when it unfolded in a context of uncertainty. Although the outcomes of telework may differ by gender (Çoban, 2022), in our study individual understandings of telework were not different for men and women.

An unexpected, context-related interpretation may have been unintentionally exacerbated by the signals sent either by the firm itself or by the industry it belongs to. As far as the firm was concerned, while the main signal was that telework was implemented as an incentive for employees, to show them the firm's willingness to care for them, the organisation was also keen on transmitting that telework was not a right but a privilege. Given the unstable situation generated by the crisis, this signal may have reinforced the interpretation that telework posed a threat: in a crisis, requesting privileges was understood as a dangerous choice. The signals sent by the firm became inconsistent because of the context in which they were sent. Also, the organisation may have sent unintentional signals that clashed with teleworking, disturbing the signalling process (Taj, 2016). Outsourcing emerged as an unintentional and disturbing signal. Some employees felt that if the job did not need to be conducted in-house, given the need to cut costs, an external contractor might perform it. The fact that ConsultCo outsourced certain jobs appeared to have confused receivers with regard to the meaning of telework.

The consulting industry may also send messages reinforcing individuals' understanding of telework as a threat. In professional service firms, good performance is often associated with long work hours facing clients, because performance is measured in terms of billable hours (Landers et al., 1996). Also, the classic structure of consulting firms requires them to apply an up or out system. They hire many junior professionals but only a few will progress within the firm (Suseno & Pinnington, 2017). The work standards pervading the industry may indicate to employees that being present is necessary to get promoted and even to keep one's job. Industry features would likely strengthen the understanding of telework as a potential threat. Overall, this suggests that practices not intended as signals, originating in the company or the industry, which have been generally disregarded by the literature (Connelly et al., 2011), may become relevant because of the context in which they unfold.

This paper contributes to developing signalling theory in HR studies (Suazo et al., 2009), offering insights on the relevance of the signalling environment for interpreting messages. We show the signalling environment, described as an "underresearched aspect of signalling theory" (Connelly et al., 2011, p. 62), plays a foreground role in shaping the receivers' interpretation of the signal. While the intended signal was that telework is an employee-oriented practice, the contextual processing by employees, in light of the crisis, led to a diametrically opposed interpretation: teleworking as a threat. The environment may not only act as a source of noise or distortion but may drastically transform the meaning ascribed to the signal, leading to unintended interpretations and reactions that become attached to the practice. To avoid this, consistency between the signal and the environment is needed. Therefore, the concept of external fit emerges as a novel construct to be considered. While consistency is defined as the "agreement between

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multiple signals from one source" (Connelly et al., 2011, p. 52), we define *external fit* as the alignment between signals sent by the signaller and those embedded in the signalling environment.

The concept of *external fit* also contributes to the HRM processes literature (Bowen & Ostroff, 2004; Piening et al., 2014). It sheds light on the mechanisms that shape individual interpretations and experiences of intended and implemented HR practices. To build strong HR systems, practices should be aligned with the environment the organisation is embedded in. The lack of external fit may reduce the systems' strength, making the messages sent by HR practices more subject to unintended interpretations (Bowen & Ostroff, 2004).

This study provides evidence that HR practices create signals interpreted within specific contexts. Although HR practitioners and managers may be in control of the signals they send, they are not able to determine how such signals are interpreted. Firms need to analyse the environment to understand how messages are interpreted. An interpretation emerging during economic growth or stability may be distinct to one emerging in times of crisis. A financial crisis, COVID-19 or other types of turbulence provide a chance for companies to strengthen levels of trust among employees. The literature on trust suggests that managers show lack of trust towards teleworkers' ability or motivation to achieve office-like performance levels (e.g. Bailey & Kurland, 2002; Peters et al., 2016). However, managers should also consider issues of trust that employees may face towards the firm in times of crisis and realize that employees may require more reassurance regarding job security. Looking for fit between the signal and the environment is relevant to reduce unexpected interpretations. This points to the need to monitor the environment over time. Given the current rapid change and recurrent turbulence, a practice that takes months or years to be implemented may unfold in a situation that is different to the one in which it was conceived.

These findings have limitations. First, it is possible that employees were exposed to additional signals that did not emerge during the interviews. For example, the consulting industry could be sending signals on the importance of being present in front of clients. This would make consultants more likely to interpret telework as a threat than other professionals, such as software developers. The existence of parallel signals would not question the signalling environment's role but could make for more comprehensive understanding of the complexity behind interconnected signals in organisations. Future work may explore the extent to which signals sent at different levels (e.g. team, firm, industry) are interpreted, and how their interaction might change such interpretation. Second, firms may use different practices to send messages embedded in different signalling environments. Although the theoretical proposition that the environment plays a key role in how the message is interpreted by the receivers would remain valid, future research could explore how employees interpret other HR practices (e.g. pay for performance or job sharing).

Another aspect that deserves further exploration is power. Previous work shows that even for jobs are deemed equally suitable for telework, certain occupations face more difficulties in adopting the practice than others due to lack of power (Bailey & Kurland, 2002). Although we did not find evidence that individual interpretations of telework were different per hierarchical category, it is possible that such interpretations are influenced by the strength of the individual's bargaining position within the firm.

Finally, the financial crisis may differ from other types of turbulent environment. Telework is often taken as a measure to secure the continuity of work in extraordinary circumstances, such as the COVID-19 pandemic (Chong et al., 2020), the events of 9/11, or natural disasters (Donnelly & Proctor-Thomson, 2015). Such events are like the financial crisis in that they all cause economic activity to contract and increase competition for survival. Employees also experience similarly dire consequences (Prouska et al., 2016). The events differ when telework is government-driven and companies and employees are obliged to transition to full-time telework (Chong et al., 2020), unlike the more voluntary telework offered to employees during the financial crisis. Given these differences, future research could explore employee interpretations of telework in different turbulent contexts.

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7 | CONCLUSION

Employees do not necessarily interpret telework as a perk. They may reject the practice because of interpretations that emerge as it unfolds. Individual interpretations of global events can alter the meaning ascribed to teleworking. This paper provides evidence of the prominent role the signalling environment plays in interpreting signals sent by organisations. It brings forth the concept of *external fit* to highlight the need for companies to consider the signals embedded in their environment and to align them with the signals they send through their HR practices.

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CONFLICT OF INTEREST

There is no conflict of interest with respect to the publication of this article.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are available on request from the corresponding author. The data are not publicly available due to privacy or ethical restrictions.

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SPECIAL ISSUE ARTICLE

From what we know to what we do: Human resource management intervention to support mode 2 healthcare research

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Abstract

There is a huge volume of evidence about what is clinically effective and efficient, but this is slow to translate into front-line practice. To address the problem, we need to support clinical academics and practitioners to co-produce research and service improvement; necessitating HRM intervention. Our case study shows common purpose in mode 2 research across clinical academics and practitioners can be attained by focussing upon their professional identity, within which their status and jurisdictional autonomy are key dimensions. Our study shows how development workshops, through which control is ceded by managers to clinical academics and practitioners, are used to co-design HRM interventions to support mode 2 research. Relevant HRM interventions are first, performance management that is non-intrusive and aligns with criteria clinical academics and practitioners value. Second, job design that allows autonomy and status enhancement for clinical academics and practitioners engaging in mode 2 research.

KEYWORDS
academic-practitioner collaboration, healthcare, human resource management, mode 2 research

Abbreviations: APC, academic-practitioner collaboration; COPD, chronic obstructive pulmonary disorder; HR, human resource; HRM, human resource management; PhD, doctor of philosophy.

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Practitioner notes

What is currently known?

- Mode 2 research is encouraged in human resource management, but we know little about how it works in practice
- Professionals can successfully resist managerial intervention, including that aimed to support mode 2 research

What this paper adds?

- Identifies the antecedent dimensions of identity that need to be invoked to support mode 2 research amongst core professional employees
- Identifies the specific HR interventions—performance management and job design—that engage core professional employees in mode 2 research
- Insight into how to engage core professional employees in co-creation of HR interventions

The implications for practitioners

- Do not impose HR interventions upon core professional employees, but allow them to co-create these HR interventions to support mode 2 research
- Performance management should be non-intrusive and align with criteria valued by core professional employees to support their engagement in mode 2 research in a professionalised setting
- Job design should allow for autonomy and status enhancement for core professional employees to engage in mode 2 research in a professionalised setting
- Training and development workshops can be used for core professional employees to co-create HR interventions to support their engagement in mode 2 research in a professionalised setting

1 | INTRODUCTION

Co-production of impactful research-informed intervention, or what might referred to as mode 2 research, sometimes referred to as academic-practitioner collaboration (APC) (Bartunek & Rynes, 2014), or intervention research (Radaelli et al., 2014), has been a feature of business and management research for some time and continues to inform our research practice (Bartunek, 2011). HRM researchers, however, appear slow to engage in academic-practitioner research collaborations (APCs) towards mode 2 research (Harley, 2015; Lawler & Benson, 2022; Pfeffer, 2007; Rynes, 2007). And, despite encouragement to do so, we still lack understanding of antecedents to, the process of, and practical prescriptions for, HR interventions to support mode-2 research (Guerci et al., 2019). In Hewett and Shantzs' (2021) terms, we require insight into the process of co-creation of HR interventions with stakeholders, including in particular, the influence of employees, as well as understanding of content of HR interventions to support mode-2 research. Related to our professionalised setting set out below, we set out three inter-linked research questions: What are antecedent conditions shaping prospects for academics and practitioners engaging in mode 2 research in a professionalised setting? How do such antecedents determine the content of HR interventions that prove effective in engaging academics and practitioners in mode 2 research in a professionalised setting? How might we engage academics and practitioners in co-creation of HR interventions to support mode 2 research in a professionalised setting?

Our empirical study seeks to illuminate the challenges and solutions to the co-creation of HR interventions to support mode 2 research, focussing upon a project-based organisation with fixed-term funding. Our focal project-based organisation is an APC that seeks to draw in efforts of two groups of core professional employees with different perspectives and identities (clinical academics and clinical practitioners) in translational health

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research (generating evidence about what works for patient benefit and then diffusing this into practice) (Currie et al., 2014). Our APC case represents an endeavour that itself can be characterised as invoking a mode 2 approach. Our APC case represents a transdisciplinary endeavour with expected outcomes of research that is both sufficiently academically rigorous to give rise to high quality peer-reviewed publications and sufficiently relevant to improve frontline healthcare delivery for the benefit of patients (Guerci et al., 2019). Such demands for better care delivery underpinned by generation of scientific evidence prove challenging to enact for clinical academics and practitioners because commonly they enact more specialist roles and career paths towards care delivery or scientific research (Currie et al., 2014; Dunn & Jones, 2010; Goldstein & Brown, 1997; Yanos & Ziedonis, 2006). Following which, one can assume core professionals impact how HR interventions designed to support such mode 2 translational health research are received (Chen et al., 2022). Indeed this proved so with clinical academics and practitioners resisting the managerially imposed performance management system put in place to engage them in mode 2 research. At which point we were called in to undertake action research (Bradbury, 2008; Reason & Bradbury, 2008) to examine the problem and work with APC management to support the development of HR interventions to motivate powerful core professionals to engage in mode 2 translational health research. In essence, our case study is likely to render very visible antecedents to, the challenges of, and practical prescriptions for the process and content of HR interventions to support mode 2 research in professionalised settings in line with our research questions.

2 | LITERATURE REVIEW: MODE 2 RESEARCH, PROFESSIONAL IDENTITY AND HRM

Hewett and Shantz (2021) define co-production, or more accurately they use the label 'co-creation' as a "continuous process in which HR and stakeholders create value through collaborative efforts to problem-solve and innovate in the design and use of human resource interventions to help them better satisfy stakeholders' needs". They argue co-creation generates greater value than if HR managers solely designed interventions, more so in start-ups and project-based organisations, both of which are characteristic of our empirical case under study. They emphasise that HR interventions commonly evolve once introduced in a process that is dynamic and iterative by nature. Employee response to a HR intervention is likely to shape the practice itself (Kehoe & Han, 2020; Van Mierlo et al., 2018). Thus HR interventions need to be inscribed into the interpretive schemes of employees and gain legitimacy amongst employees to be effectively implemented and add value (Cooke, 2018).

Managers remain important to diffuse HR interventions across the organisation (Beer, 1997), but the balance of agency and control across managers and employees is a crucial dimension of the process of co-creation, and around which we require insight (Hewett & Shantz, 2021), in particular more contextualised insight into HR co-creation (Mirfakhar et al., 2018). In outlining receptive conditions for co-creation of HR interventions, Hewett and Shantz (2021) emphasise the importance of collaborative use and co-design by the wide range of stakeholders subject to HR interventions, particularly employees, whose involvement and participation means they are then more committed to their implementation (Bos-Nehles et al., 2013; Budjanovcanin, 2018; Meijerink et al., 2016), otherwise an implementation gap ensues (Piening et al., 2014). Following which, Hewett and Shantz (2021) advocate managers work closely with employees, to jointly utilise their skills and experience to design HR interventions that better meet users' needs. Given goals of managers and employees are not always compatible (Guest & Bos-Nehles, 2013), and that complex organisations, such as the empirical one under study commonly tend towards bureaucracy, then relational ties across stakeholders need to be cultivated to create integrative outcomes (Gittell & Douglass, 2012).

Institutional conditions associated with context represent antecedents for prospects of HR co-creation (Hewett & Shantz, 2021). In our empirical case of translational health research, both clinical academics and practitioners are powerful professionals, and as such bring strong identities to bear upon any attempts to manage their practices. Professional identity represents "an individual's self-definition as a member of a profession" (Chreim et al., 2007, p. 1515), rather than, for example, identity derived from their organisational membership. At the core of their claim to be a professional, first, they focus on client interest, rather than pursuit of self-interest (Wright

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et al., 2017). Second, to be a professional is to be granted autonomy and control your own work (Freidson, 1988). This is derived from a specialised knowledge base, into which professionals have been trained and socialised, and around which they have a discrete jurisdiction (Abbott, 1988; Freidson, 1988). Professionals are thus likely to defend their jurisdiction and autonomy against changes that threaten their identity and autonomy (Abbott, 1988), in particular resist new practices they perceive as attempting to control them (Noordegraaf, 2011). As part of their efforts to counter intrusion upon their jurisdiction, professionals seek to stratify themselves from other professions and occupations to enhance their status (Abbott, 1988). Any success in co-creating HR interventions is likely to rely upon engendering a constructive relationship between managers and professionals that hold different sources of power (Ferrary, 2005). To emphasise our point, we require greater insight into the process of co-creation of HR practices in professionalised settings.

When applying this to the translational health research field, first HR intervention needs to take account of divergent career trajectories enacted within the medical field. In particular, the role of clinical academics, professionals that translate discoveries to the bedside, is a threatened one, with young doctors forced to choose between research or practising medicine in their increasingly compartmentalised careers. Then even where they do gravitate towards research, they choose basic science rather than clinical science, because it is less constrained, generates clear-cut results, and is more likely to generate peer-reviewed publications and grants (Goldstein & Brown, 1997). Where they attempt to combine clinical practice and clinical research, role holders may experience confusion about what their job really is and associated ways of being; that is, being a clinical academic represents an identity challenge for role holders (Yanos & Ziedonis, 2006). Yet, while representing a less attractive role, clinical academics represent 'bridgers' between practice and science worlds, with their clinical experience and direct exposure to clinical pheneomena or service systems they study allowing them to recognise many real world issues that inspire relevant and innovative research, create a virtuous dynamic of ideas between clinical and research domains, and facilitate dissemination and implementation of evidence-based care (Yanos & Ziedonis, 2006). Their training and development, and rewarding their mode 2 efforts, has thus increasingly been seen as crucial to ensuring translational health research for patient benefit (Goldstein & Brown, 1997). Meanwhile, for clinical practitioners, the challenge is one of operational pressures associated with constrained resource and increasing demand for clinical services, which eat into their opportunity to engage in any research, even that directly applied to improving patient care (Currie & Suhomlinova, 2006). Yet engaging in translational health research is likely attractive for clinical practitioners, if space can be carved out for them to engage, on the basis it will enhance their status amongst peers (Currie et al., 2020).

Second, linked to the above, HR intervention needs to take account of divergent performance measures applied by government agencies to higher education institutions (orientated towards generating research income and high impact peer-reviewed publication), and health care providers (orientated towards reducing waiting times and lists, and ensuring services are patient safe). Following which, narrowness of clinical academic and clinical practitioner roles are reinforced. It used to be difficult to distinguish clinical academics and practitioners, with each enacting a tri-partite mission to provide teaching, engage in research and deliver clinical care. However, in the face of divergent performance measures, workload allocation that underpins job design in their respective employing institutions means clinical practitioners are unlikely to have protected research time, and clinical academics less likely to deliver care in provider settings (Currie & Suhomlinova, 2006).

Third, derived from the above, the perspectives of clinical practitioners and clinical academics upon what constitutes relevant research also diverges. Academics in healthcare value experimental methods that produce statistical generalisability, aligned with procedural assessment criteria of their peers that review grant submissions or manuscripts for prestigious journals. Meanwhile, clinical practitioners' immediate need for improving their services is more likely met by applied research considered less rigorous by academics (Currie et al., 2014).

Unsurprisingly, therefore, clinical academics' and practitioners' career paths are likely to vary once they exit their initial training together, as they become socialised into their different specialist identities (Dunn & Jones, 2010). The

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challenge of designing HR interventions to engage them in mode 2 research in translational healthcare research, is thus rendered more difficult because there are two groups of powerful professionals, clinical academics and clinical practitioners, whose incentives, values and work roles are increasingly divergent.

Following which, users (in our case clinical academics and practitioners) influence the implementation of HR interventions and whether intended outcomes are realised (Bos-Nehles et al., 2013; Budjanovcanin, 2018; Jansseens & Steyaert, 2009; Purcell & Hutchinson, 2007; Shipton et al., 2016; Ulrich et al., 1989). Where users 'actively' engage in co-creation of HR interventions, this generates better outcomes: it satisfies multiple users' needs simultaneously; users feel more committed to co-created HR interventions, which in turn increases their use; stronger relational ties across the HR function and its users develop; HR managers and users enhance understanding of each others' perspectives (Hewett & Shantz, 2021). Finally, the need for insight into process-related understanding of implementation of HR interventions (Guest & Bos-Nehles, 2013) demands longitudinal research, that is contextualised and acknowledges the multi-actor and complex nature of HR implementation (Budjanovcanin, 2018). We set out the dimensions of our own research design along such lines in the next section of our manuscript.

3 | RESEARCH DESIGN

3.1 | Empirical context

We empirically focus upon an APC (EliteMed), externally funded £10mn from a national government agency for clinical academics and practitioners (primarily doctors) to engage in mode 2 research to improve services for the benefit of patients across a range of long-term conditions, such as mental health, respiratory health (COPD), diabetes (Cooksey, 2006). There were nine such APCs funded across the English National Health Service (NHS).

Our main research interaction, at least initially, was with EliteMed managers, whom directed our attention upon performance management. As set out in our empirical analysis however, subsequently, through our longitudinal study, we engaged with core professional employees, that is the clinical practitioners and clinical academics enacting translational health research, following the failure of the performance management intervention. Through our engagement in workshops with core professional employees, we drove EliteMed management and their national peers towards greater recognition that implementation of HR interventions was a multi-staged process that included and blended with co-creation of HR interventions (Hewett & Shantz, 2021; Mirfakhar et al., 2018). In our empirical analysis set out below, we provide insight into the conditions for co-creation of HR interventions that led to more effective implementation.

In our specific empirical case of EliteMed, COPD provides a benchmark for success of co-production. Regarding practical relevance, the new COPD service co-produced through the APC, showed reduced cost and improved patient care (reduction in mortality rates, in large part because patients were triaged more effectively and secondary care and primary care were better integrated), following which it diffused from its originating site to 15 other healthcare providers in the region covered by the APC. Regarding demand for academic rigour in the co-production of the new service, clinical academics successfully bid for additional large-scale funding to further evaluate the new service, associated with which they built research capacity through supervising post-doctoral and doctoral researchers, and published in high quality peer-reviewed journals.

There are three main stakeholders involved in the co-creation of HR interventions we examined: EliteMed's executive management team that developed and implemented HR interventions to support mode 2 research; clinical, mainly with a medical background, academics employed by a university medical school; clinical practitioners, mainly doctors employed within healthcare providers (hospitals, community care, primary care mental health care) geographically close to the university.

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3.2 | Data collection

EliteMed managers struggled to engage clinical academics and practitioners in the APC through a performance management system they had imposed, following which we were commissioned 12 months after the start of the APC, to evaluate their model of mode 2 research, with a focus upon how HR interventions best support their aims. In the words of EliteMed's Director, "we were to work with them to adapt HR practices if deemed necessary". Our research was both retrospective, to examine the performance management intervention they put in place at inception of the APC, and 'real time', to examine prospects for HR interventions in performance management and "any other domains of HRM we deemed relevant to support our aims" (EliteMed Director); that is, our approach represented 'action research' (Bradbury, 2008; Reason & Bradbury, 2008).

Our action research approach is one suggested as a more feasible route to mode 2 research in management settings (Kiesser & Leiner, 2012). HRM research lacks such a tradition, nevertheless action research is not uncommon (Styhre, 2004; Vashdi et al., 2007; Zhang et al., 2015); indeed action research is particularly relevant for HRM focussed upon systemic interventions in complex organisational contexts, where the introduction of HR interventions may not develop as planned (Bleijenbergh et al., 2021). We fed back to the EliteMed executive managers in a 'safe' learning space for both parties (Guerci et al., 2019). Following which, we were invited to feed back our research to clinical academics and practitioners within workshops put in place by EliteMed managers, which encouraged clinical academics and practitioners to reflect upon HR interventions to support mode 2 research, and where necessary, co-create them (Molineux, 2013).

As detailed in our empirical analysis, whilst our engagement with EliteMed managers in meetings was participative, within the workshops we 'sat back' and fed back our research to promote reflection and action by clinical practitioners and academics. Following which, our role reverted to non-participant observation as the latter drew upon our research to engage in co-creation of performance management systems, and other HR interventions (specifically job design) they felt relevant to support the mode 2 research aims of the APC. We then followed up with workshops with the core professional employees to examine the process and effect of co-creation of HR interventions and understand why they worked (or not) to support the aims of the APC for mode 2 research in the translational health research domain.

In total, we conducted 134 semi-structured interviews. All managers of the EliteMed executive team (12) were interviewed four times (48 interviews). EliteMed managers were interviewed at inception of our study, and after 12-month of our study, prior to the researchers feeding back about HR intervention failure. EliteMed managers were interviewed again following researcher feedback, 18 months into our study, capturing their reflections upon failure of their original performance management intervention, and then a final interview took place following co-creation of HR interventions with clinical academics and practitioners after 30 months of our study. Twenty five clinical academics and 18 clinical practitioners (i.e doctors) involved in co-creation of HR interventions were interviewed twice, over the lifespan of the research, around 15–16 months (commenting on the original HR interventions), and then again around 32–33 months (commenting on modified HR interventions that were co-created) into our study (in total, 86 interviews with clinical researchers and practitioners). All interviews were fully transcribed.

As participant observers, fieldnotes were generated across 4 meetings with EliteMed managers (8 h) and, as non-participant observers we collated fieldnotes from a further 56 h of workshops in which clinical academics and practitioners co-created HR intervention. Periods of observation lasted between 1 and 8 h at any time. During observations, we actively immersed ourselves in EliteMed. We became 'groupies' on the EliteMed event scene, engaging in informal conversations with various research subjects before and after workshops, and at serendipitous encounters during coffee breaks and lunches, around workshops. Notes were taken during or immediately following such observations or conversations as appropriate. These fieldwork notes were encompassed within a case study database, alongside interview transcripts and documentation, and subjected to analysis as detailed below.

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3.3 | Data analysis

Our starting point for research was a problem-centred one, directed by EliteMed managers to interrogate failure of the performance intervention they had implemented in a top-down way. Following their directive to focus upon performance management, we followed an abductive logic. Abductive reasoning is characterised by constant dialog between theory and empirical findings, which involves an analytical strategy based on continuous formulation and iteration of questions and answers from literature to both focus and explain emerging findings (Mantere & Kekokivi, 2013). So, our literature review informed analysis in more deductive way, for example, identifying how HR intervention might support mode-2 research, but the influence of professional identity upon this emerged from the data, following which we perused relevant literature, that of sociology of professions, retrospectively.

Our analysis was one carried out across temporal brackets aligned with our action research, within which the level of analytical generalisation was raised (Yin, 2003). Analysing data in the first temporal bracket, we confirmed failure of the performance management intervention to support mode 2 research, following which we raised level of analysis as we sought a theoretical explanation for 'failure'. At this stage, literature about professional identity provided theoretical insight, specifically understanding the failure of the performance management intervention as one where it compromised the status and jurisdictional autonomy of clinical academics and practitioners. Our second temporal bracket was particularly action research orientated as we sought to drive reflection and action by EliteMed managers. This buttressed our understanding the performance management intervention to support mode 2 translational health research should align with professional identity. In particular, we ascertained that collegial approaches to decision-making characteristic of professionalised settings should inform a more collaborative approach to intervention. In a third temporal bracket, we followed through to observe workshops within which HR interventions were co-created with clinical academics and practitioners to support mode 2 research, and drew upon relevant literature (e.g. Hewett & Shantz, 2021) to explain its effectiveness. Following which, in our final temporal bracket we ascertained the effect of co-created HR interventions upon mode 2 research in the translational health research domain. In our final stage of analysis, we drew our insights across the four temporal brackets together, to understand the relationship between co-creation of HR intervention across managerial and professional stakeholders and professional identity to arrive at our final theoretical interpretation as presented in our next section, the empirical presentation.

Throughout the data collection and analysis process, we emphasise the need for researchers to enact mode 1 controls over quality as they enact mode 2 research. Action research can play into managerial agendas, where it is commissioned by managers in pursuit of organisational advantage. We took care with our data collection, ensuring we interviewed a range of core professionals, less and more receptive to mode 2 translational health research, and remained wary of individuals' attribution of actions and their effect through complementing interviews with observation. More crucially perhaps, our analysis outlined above was one we sought to continually authenticate with our research subjects, specifically the core professionals subject to HR interventions (Watson, 2000).

4 | EMPIRICAL ANALYSIS: PROCESS AND CONTENT OF CO-CREATION OF HR INTERVENTIONS

4.1 | Failure to impose HRM interventions: The importance of professional identity

EliteMed managers initially instituted performance management that threatened the professional identity of both clinical academics and practitioners, and thwarted their interaction:

> Performance management is one of the major barriers to our engagement with our practitioner colleagues around this
>
> (M.R21-Clinical Academic)

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Given clinical professionals value their identity, intrusive performance management intervention was unwanted:

> I don't have a lot of people telling me what to do. I do not want to have, other people, particularly managers to impose targets on me. I expect to carry out my research on my own
>
> (M.R12-Clinical Academic)

> We didn't appreciate their [EliteMed managers'] interference of how we are going to do the project. It is all about managing your own work and being given autonomy to do that. You always have the authority to shape things the way you personally envisage them, and that can never change
>
> (M.R25-Clinical Practitioner)

Those clinical academics and practitioners that did sustain engagement with the APC, buttressed by their professional power, buffered themselves from external managerial intrusion. They took the funding offered by the APC and pursued their own interests aligned with their professional identities. This limited collaboration across professional ranks:

> It is about being responsible for your own work … and that's what we did in line with what we thought was best … we sought to generate peer-reviewed publications
>
> (M.R3-Clinical Academic)

That clinical academics and practitioners distanced themselves from the EliteMed projects in which they participated, was reflected in their dis-engagement:

> It's the (EliteMed) way or the highway … they set out a template for how we should behave in the training workshops … and frankly, I said fine, take your money away. I could do without the headache.
>
> (M.R26-Clinical Academic)

In summary, HR interventions to support mode 2 research did not align with professional identities of both clinical academics and practitioners and so they failed to engage in collaborative processes. Considering this resistance, and informed by feedback by ourselves, EliteMed managers reflected upon this failure, which we detail in the following section.

4.2 | Management reflection upon failure of imposed HRM interventions

Our investigation provided the basis for EliteMed managers to act upon the failure of HR interventions imposed upon professionals. We were invited to participate in several strategic meetings with EliteMed managers where they emphasised their need "to reflect on recent experiences and foster learning" (meeting observation, M.R5-EliteMed Manager). During these meetings, EliteMed managers, especially those dealing with the implementation of HR interventions, talked about iterative learning processes:

> We need to spend a lot more time perhaps as a team working through problems to learn how we can approach and how we can change what we do.
>
> (meeting observation, M.R12-EliteMed Manager)

Managerial reflections were forward looking in scope aiming to convert their reflections about "why they [referring to clinical practitioners and academics] resisted our practices for quite a long time [into explicit action regarding] …

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how are we going to respond to all this?" (meeting observation, M.R1-EliteMed Manager). EliteMed managers understood it was not just the content of HR interventions that stymied collaborative processes, but that the process through which they were designed and moreover, implemented, was viewed as intrusive by professionals:

> They never appreciate managers interfering with their work. It is their work, and they want to manage their own work.
>
> (M.R3-EliteMed Manager)

> They don't want people, particularly managers imposing targets on them.
>
> (M.R12-EliteMed Manager)

EliteMed Managers reflected on professionals' expectations for a high degree of control over their academic or clinical practice to protect their professional identities. Following which, "we tried to give people more freedom to shape things" (meeting observation, M.R10-EliteMed Manager).

Belatedly, working with the research team, EliteMed managers recognised "our practices are not being perceived positively" (M.R10-EliteMed Manager), and so sought to refine "how we make people inspired and eager and motivated" (meeting observation, M.R11-EliteMed Manager). In the next section we summarise our findings about the subsequent process of co-creation of HR interventions with clinical academics and practitioners.

4.3 | Management of Co-creation of HR intervention with core professionals

Following failure of the managerially imposed performance management intervention to engage clinical academics and practitioners in the APC, our research team were tasked with organising workshops to co-create HR interventions. These were re-orientated:

> Away from our [EliteMed managers] previous aim to equip them [clinical academics and practitioners] with the capability to support translational health research, more to bring together researchers and practitioners to work iteratively and collaboratively in developing [human resource] management interventions to support translational health research.
>
> (M.R9-EliteMed Manager)

This represented a direct response to the perceptions of clinical academics and practitioners that:

> Until this point at least, until you [the research team] started talking to us, there was traditional managerial dominance within which implementation of HR interventions was controlled by EliteMed managers.
>
> (M.R7-Clinical Practitioner)

Such a managerially-led approach had generated a "lack of trust from us about their [referring to EliteMed managers] goals and motives" (M.R17-Clinical Practitioner). And core professional employees, "welcome direct interaction with the research team to address this, it's crucial we enage with you rather than managers" (M.R21-Clinical Academic).

It was not that clinical practitioners and academics were necessarily reluctant to engage with mode 2 efforts or more specifically the co-creation of HR interventions, but more they expected the latter to "take place in a constructive manner that proves rewarding for those that engage and adds value for EliteMed through our [clinical practitioners'] understanding of what motivates our colleagues to carry out translational health research" (M.R6-Clinical Practitioner). The constructive manner proposed by clinical practitioners and academics was one where "we should

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be left alone to design our own management, without interference from them [referring to EliteMed, managers]" (M.R24-Clinical Practitioner):

> Sometimes it can be frustrating having to do things for EliteMed, and you can not see its relevance. We have to do what make sense to us and they [referring to EliteMed Managers] have to look and understand our interests and use our knowledge to inform more well rounded practices. And retrospectively it would've made much more sense for them [referring to managers] to ask to engage in this process a year ago when we started our journey with EliteMed, but at least they doing so now, and it's important to just let us get on with it.
>
> (M.R6-Clinical Academic)

At the same time, core professional employees recognised that "trial and error might be necessary … it doesn't mean what you put in place was going to work the first time, but then you have to have this iterative development that's looking at how well you adjusting to our unique clinical situations, so allow for learning" (M.R13-Clinical Academic).

EliteMed managers thus stepped back, and allowed the research team, "acting as a neutral party or broker … to elicit experiences of performance management and any other intervention by them [referring to clinical academics and practitioners]" (M.R2-EliteMed Manager). The co-creation process was characterised by "getting to know [again referring to clinical practitioners and academics] their interests and engage in iterative development and learning through reflection" (M.R6-EliteMed Manager). Clinical practitioners and academics thus proposed, "facilitation of workshops with a strong problem-solving approach that focuses primarily on eliciting clinicians' views, rather than assume these, on how to improve clinical engagement with EliteMed and health research" (M.R18-Clinical Practitioner). Clinical practitioners and academics emphasised the need, during workshops, for "discussion to be driven by clinical knowledge rather than managerial authority" (M.R8-Clinical Practitioner), in particular, to be, "less about performance management and more about allowing us to self-direct the development of the very management practices to which we are exposed" (M.R17-Clinical Practitioner).

Usually workshops commenced with a "setting the scene … creating a safe environment … whereby participants would feel comfortable" (comments prior to beginning of one workshop from M.R5, M.R7, & M.R12, EliteMed Managers). The research team then presented their analysis of failure of the performance management intervention to engage clinical practitioners and academics in mode 2 research through EliteMed, following which the research team stepped back. "Informed by the research we asked them to explore challenges that have emerged and how to overcome these to influence their work" (M.R1-EliteMed Manager). Workshops were created keeping in mind the need to embed reflection and co-creation of HR interventions "in the context within which they [referring to clinical practitioners and academics] have to work, be collaborative in nature, invite contributions from both clinical academics and practitioners so that workshops goals were co-developed with those professionals" (M.R6-EliteMed Manager).

To aid the co-creation process, workshop participants had identified colleagues that represented "first amongst equals, those clinicians with sufficient influence and status to facilitate not just talk, but action" (M.R12-Clinical Practitioner). They represented 'knowledge brokers' (Currie & White, 2012); that mobilised the right knowledge (of their perspectives and practices) to the right people at the right time (from practitioners to their academic colleagues on the other side of the 'fence' or vice-versa); that were mandated by their academic or practitioner colleagues to engage in the workshops. (see 'Practitioner Note') The concerns of clinical academics and practitioners were thus brought to the fore in the workshops. They emphasised HR interventions, "needed to be dynamic and subject to context" (M.R31-Clinical Practitioner). Over time, initiated by their workshop interaction, knowledge brokers from both sides of the fence brought the colleagues they represented together in 'communities of practice' (Lave & Wenger, 1991) focussed upon their shared interest in a clinical service domain. Such communities were to prove crucial when wider professional engagement was required to scale up evidence-based clinical services derived from the Elite Med APC (see 'Practitioner Note').

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The content of HR interventions co-created in such a manner, which represented the antecedent conditions for clinical practitioners and academics to engage in translational health research, is detailed below.

4.4 | Content of co-created HR interventions

4.4.1 | Performance management

Clinical academics and practitioners agreed that EliteMed managers had to influence the "measuring of outcomes and improve our performance" (workshop observation, M.R19-Clinical Practitioner), but in a way that was not perceived "to be a burden" (workshop observation, M.R24-Clinical Academic) or "a threat" (workshop observation, M.R41-Clinical Practitioner). A critical element of monitoring that motivated those professionals was to "indicate where change is needed rather than to control what we do" (workshop observation, M.R43-Clinical Academic). Core professionals explained that "performance management intended to improve efficiency usually challenges the performance of the project or fails to harvest the desired effect" (M.R12-Clinical Academic). Following which performance management criteria and approach were refined to align more with the professional identities that clinical researchers and practitioners expected:

> We're given that autonomy that aligns more with the type and nature of our work
>
> (M.R22- Clinical Academic)

> They have realised that we are professionals, and we value discretion and autonomy in what we do
>
> (M.R19-Clinical Practitioner)

We witnessed several discussions between those professionals negotiating indicators of success. Clinical practitioners emphasised "impact upon service improvement" (M.R34-Clinical Practitioner) remained core to judgement of success of project investment. But we also note that there was equal emphasis upon quality of evidence produced by research as reflected in citation impact of peer-reviewed publications, alongside the gaining of external research income linked to projects, the latter recognised as important because service improvement required scaling up:

> Doing impact work requires time and additional resources. People assume that research translates into everyday practice and wonder why academics would not want to get involved, when of course the reality is that on a day-to-day basis we are extremely busy. I am now happy to engage in translational [driving academic evidence into practice] work
>
> (M.R12-Clinical Academic)

The performance management system, when co-created with core professionals, was now perceived as less intrusive. It could be argued that the actual performance criteria to which clinical academics and practitioners had not shifted much; what was crucial was less the content in this case and more the process through which the performance management intervention was co-produced that engendered its acceptance. A formal project management structure was created to represent both professional groups, who met often to review project performance in regular workshops. These workshops were created to facilitate negotiation and shared understanding of performance requirements and associated metrics. The traditional understanding that knowledge was "produced by clinical academics and consumed by us (referring to practitioners)" (M.R19-Clinical Practitioner) was challenged and a more shared and iterative approach to knowledge development through collaborative processes was emphasised. Many alluded to the fact that the process of co-creation of HR interventions to support translational health research encompassed "working together and learning from each other" (workshop observation, M.R19-Clinical Practitioner) and developing

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"a common language, shared rituals and a shared purpose" (M.R-17-Clinical Academic). Thus they felt other HR interventions were also required to motivate those professionals to engage with each other in collaborative processes, in particular job design.

4.4.2 | Job roles and responsibilities

While the workshops were set up address the failure of the performance management intervention, the remit given to clinical academics and practitioners by EliteMed managers was wider. Discussion of professional identity and jurisdictional autonomy, led to discussions that higher status needed to be associated with any knowledge brokering role to be enacted by clinical academics and practitioners, for such roles to prove attractive. The more prosaic issue of 'time' to enact the role was also highlighted. Following which, workshop participants sought to more explicitly scope out duties and responsibilities of the knowledge brokering role, and ascertain the title that might be ascribed to the role that would be valued by their colleagues.

Status gain related to existing professional identities but derived from a leadership role they fulfiled as "quality improvement leaders" (M.R34-Clinical Practitioner) was highlighted by core professionals. For this leadership potential to be fulfiled, and status gain to ensue, their roles within EliteMed had to be carefully co-designed with professionals and according to what "we value" (M.R42-Clinical Academic), notably their professional identity and autonomy:

> And it's that combination of academic research with patient services in our job roles and clinical input and academic input that together hopefully will mean that change happens quicker
>
> (M.R2-Clinical Practitioner)

> To keep our research time we have to generate research income and for those of us who engage with clinical practice in any designed role it is much more feasible to do so.
>
> (M.R17-Clinical Academic)

Clinical academics and practitioners emphasised that to engage in any role in the collaborative processes, jurisdictional identities, relative position and power related to their academic and practice responsibilities should be aligned with these new roles:

> I am not anti-impact, don't get me wrong, I think it is very important for clinical academics to actually have a voice in improving clinical practices but it is more important to ensure that we are able to do our academic jobs just as well, and that means basically focus on producing new promising knowledge through rigorous research.
>
> (M.R12-Clinical Academic)

> I am a clinician and I want to progress in this career. It's always attractive to work with academic practice as it help with career progression, but the priority always remains with the clinical work.
>
> (M.R7-Clinical Academic)

Professionals also highlighted work pressures in academic and hospital settings that lead "us to concentrate on peer-reviewed outputs and research grant getting" (workshop observation, M.R31-Clinical Academic) or "just focus on our clinical duties" (M.R15-Clinical Practitioner), rather than engage in additional duties concerned with collaborative processes. When talking about work pressures with clinical practitioners and academics, they often stated "we don't really have the time to do what they require from us" (M.R17-Clinical Academic) highlighting that "when you are

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under pressure, the biggest problem is time" (M.R40-Clinical Practitioner). In a meeting about an interaction with clinical academics, one clinical practitioner explained "time is something that I don't have. To engage stronger with clinical research requires time to set up those links and that is not enough, you need time to cultivate the relationships with academics to be able to do good quality meaningful work" (M.R10-Clinical Practitioner).

In response, EliteMed managers worked with clinical academics and practitioners to institute what they labelled either an, 'Impact Champion' role for clinical academics and 'Improvement Science Fellow' for clinical practitioners, which not only offered them the possibility to enhance their professional identity over time, but also mediated work pressures highlighted above so collaborative processes could be realised:

> My role has changed a lot. I've been awarded an Impact Champion role, which builds on the work we've been doing in EliteMed but provides me with my own funding source and protected time to do a lot more improvement work.
>
> (M.R18-Clinical Academic)

> The Improvement Science Fellow role is a way of getting gravitas into my clinical job. I can can actually fulfil my clinical duties and have some protected time for my research project'.
>
> (M.R15-Clinical Practitioner)

Those engaged as Impact Champions or Improvement Science Fellows opened opportunity for collaboration by allowing clinical academics to co-supervise PhDs with clinical practitioners focussed upon service improvement, which enhanced those professionals' legitimacy as an innovation leader:

> The theory practice gap, people work in research and people work in practice, and I'm interested in ways of bringing those two things together through my role as leading PhD supervision in the field of service improvement. We can learn from each other and for me, engaging with EliteMed has presented a unique opportunity to cultivate stronger contacts with the clinical frontline and something that creates a very strong reputation of myself as a legitimate leader of innovation.
>
> (M.R12-Clinical Academic)

> My role has changed significantly over the last six months. I am now an Improvement Science Fellow, and this means I have to work closely with various clinical teams to support clinical innovation and change. It seems a perfect opportunity to go up a step with my career.
>
> (M.R12-Clinical Practitioner)

In summary, the efforts of clinical academics and practitioners towards co-creating and instituting the Impact Champion or Improvement Science Fellow roles appeared fruitful in motivating them to engage in collaborative work with each other:

> EliteMed has given us a bit of a structure and support to work beyond the norms of our research here, and it's given us a real opportunity to get on and develop something together and do something a bit more exciting, a bit more out there, part of it is of course helping them to improve their performance but also collecting data for our publications. A win-win situation as you say in business
>
> (M.R13-Clinical Academic)

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5 | DISCUSSION

Our empirical analysis has focussed upon co-creation of HR interventions between managers and those they seek to manage in a professionalised setting, an APC, which aims to generate mode 2 research across clinical academics and practitioners. In addressing our interlinked research questions, our study highlights the importance of professional identity that underpins clinical academics' and practitioners' engagement in mode 2 translational health research, their response to any imposed HR interventions, the content of HR interventions, and the need to co-create the HR interventions, which, in our empirical case, acts as an antecedent to mode 2 research in the translation of scientific evidence into clinical practice. Regarding the latter, reflecting on our experience of mode 2 research, we suggest that managers should not be privileged as the user group for HR interventions in a professionalised setting for those academic researchers, like ourselves from business schools. The lesson here is to avoid capture by those that commission your research, in our case the organisational managers. We highlight our own pursuit of the type of collaborative research with core professionals, encouraged by Hewett and Shantz (2021), from which we derive the following insight.

Derived from their identity, the type of core professionals upon whom HR interventions were imposed in our empirical case, value their jurisdictionally-based autonomy, following which they expect to be free from managerial intrusion. Co-creation of HR interventions inevitably changes power and control dynamics (Ferrary, 2005; Hewett & Shantz, 2021). Core professionals must be allowed to lead, not follow, others in the process of co-creating HR interventions. The role of academic HR researchers, as well as managers, is thus to 'stand back', allowing those professionals that are 'first amongst equals' to facilitate discussion and decision-making amongst their professional peers. As highlighted in our empirical analysis, a climate needs to be cultivated within which workshops are seen as free of managerial or researcher intrusion. Thus, control needs to be ceded to the core professionals so that HR interventions align with incentives they judge as relevant, for them to engage with mode 2 translational research. This is not to dismiss a need for interactions across the three stakeholder groups of core professionals, managers and academic HR researchers, such relational ties proved crucial to co-creation of HR intervention (Gittell & Douglass, 2012). Managers provide the mandate for core professionals to co-create HR interventions that support translational health research in our case, and then follow up decisions made by core professionals about their content by ensuring they are implemented across the organisation; for example, incentives and job design have resource implications for an organisation (Beer, 1997). Meanwhile, researchers act as neutral knowledge brokers, and in our empirical case study, their analysis of failure of HR interventions facilitated the efforts of core professionals to co-create antecedent conditions for translational health research with which core professionals engaged.

Our empirical analysis highlights what HR interventions may represent receptive antecedent conditions for the translational health mode 2 research. Initially, even though failure ensued, EliteMed managers appeared to identify a set of consistent cues in the HR domain that were likely antecedents for core professionals to enact mode 2 research on the basis they linked to professional identity held dear by our focal core employees, doctors. Indeed, the HRM literature confirms their relevance, but we highlight, at least initially, EliteMed managers misaligned the content of the HR interventions with identity of the core professionals they aimed to enage in mode 2 translational health research.

First, our study confirms the importance of training and development in supporting collaborative mode 2 research processes (Kang et al., 2007; Patel et al., 2013; Prieto & Pilar Pérez Santana, 2012; Youndt et al., 2004). In our professionalised setting, training and development proved more effective when it brings clinical academics and practitioners together to enhance their shared interest in the development of evidence-based patient care in a collegial manner characteristic of professional organisation (Mintzberg, 1979). In essence, training and development should allow professionals to co-opt managerial practice to align with their identity, rather than co-opting professionals into managerial practice (Waring & Currie, 2009).

Second, we confirm the significance of performance management and the influence of professional identity upon what is acceptable for clinical academics and practitioners to engage them in mode 2 research (Foss et al., 2009; Gagné & Deci, 2005). Managerial intrusion in the realm of any HR intervention, not least externally imposed performance

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management systems to evaluate collaborative processes for mode 2 research, is particularly unwelcome since it challenges professional autonomy and status (Raelin, 1985). In our empirical case, over time, managers recognised they need to understand, and be prepared to learn about, professional practice, in this case made more complicated because there were two sets of professional practice to consider. For professionals, they showed appreciation of the managerial context within which they work, specifically the strategy and performance accountabilities (Hewett & Shantz, 2021).

Third, whilst the focus of the training and development workshops in our study was to address failure of the performance management intervention to support collaborative processes towards mode 2 research, job design emerged as an important issue for clinical academics and practitioners. Confirming such assertions in literature (Bach et al., 2008; Foss et al., 2009; Yan et al., 2013), job design had a particular effect upon professional status (Currie et al., 2012), but also mitigated operational work pressures, and consequently affected whether professionals are prepared to engage in knowledge creation through mode 2 research.

6 | CONCLUSION

Summarising the contribution of our study to HRM literature, it is three-fold. Regarding our first question focussed upon antecedents for mode 2 research, our analysis responds to calls for insight into implementation of HR intervention that is contextualised and takes account of institutional conditions, in our case that of a professionalised setting (Mirfakhar et al., 2018). We show common purpose can be attained by focussing upon professional identity of academics and practitioners, which means those seeking to manage mode 2 collaborative processes need to ensure academics' and practitioners' status and jurisdictional autonomy (Abbott, 1988; Freidson, 1988) are recognised in HR intervention.

Regarding our second research question, we identify specific HR interventions—performance management (Foss et al., 2009; Gagné & Deci, 2005), job design (Bach et al., 2008; Foss et al., 2009; Yan et al., 2013), training and development (Kang et al., 2007; Patel et al., 2013; Prieto & Pilar Pérez Santana, 2012; Youndt et al., 2004)—that engage core professionals in translational mode 2 research in our empirical setting.

Regarding our third research question, we provide insight into the process of co-creation of HR interventions that act as antecedents to mode 2 research (Hewett & Shantz, 2021). Within our institutional context, an effective stance towards co-creation of HR interventions and the translational mode 2 research that follows is one whereby, both managers and our team researching HR interventions allow core professional employees to control discussion and decision-making free from intrusion. This aligns with professional expectations about their jurisdictional autonomy (Abbott, 1988; Freidson, 1988). Further, in the process, any academic team researching HR interventions needs to take care not to be captured by the agenda of senior management, and to recognise the importance of engaging core professional employees in the HR implementation process, otherwise HR interventions will fail to add the value senior managers expect (Mirfakhar et al., 2018).

Regarding practical implications, responding to wider concern of other directors for the nine translational health research APCs, of which EliteMed was one, our study outlines relevant performance management, job design and training and development interventions, to support co-production.

Regarding its limitations, we suggest our analysis is transferable to other professionalised settings, nevertheless we encourage further research in non-clinical professionalised settings examining prospects for bridging identies through co-creation of HRM interventions across academic and practitioner communities to support mode 2 research (Hewett & Shantz, 2021).

Finally, we provide a reflective note regarding our learning as researchers about mode 2 research approaches. We did not feel our own identity as scholars was eroded in the course of our study, indeed engaging in mode 2 research provided insight that might otherwise have been unavailable to us (Butler et al., 2015; Empson, 2013). We engaged with EliteMed managers and core professionals on their (practitioners') turf and produced actionable knowledge

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to address a pressing organisational problem they had identified (Bleijenbergh et al., 2021). The needs of EliteMed managers were time critical, and if we were to engage them in the research for which they commissioned us and make impact upon practice, the generation of peer-reviewed publications should not be of immediate concern. Nevertheless, management practitioners were interested in our theoretical interpretation as a means to understand why such prescriptions were likely to work as means of abstracting lessons that were actionable beyond the immediate problem. Further, over time, we successfully bid for research grants, which included managers and core professionals involved in mode 2 translational health research, and published in high quality peer-reviewed academic journals about the management of translational health research initiatives. Through our mode 2 research we thus created a 'win-win' outcome for both us and managers and core professionals with whom we engaged (Werr & Greiner, 2008). In conclusion, we thus argue mode 2 research can prove both academically and practically legitimate, and should be seen as complementary to, not competing with, traditional modes of research (Guerci et al., 2019).

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CONFLICT OF INTEREST

The authors have no conflict of interest.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are available on request from the corresponding author. The data are not publicly available due to privacy or ethical restrictions.

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SPECIAL ISSUE ARTICLE

Theorising the impact of macroturbulence on work and HRM: COVID-19 and the abrupt shift to enforced homeworking

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Abstract

This paper is among the first to fuse Social Exchange Theory (SET) with Boundary Theory (BT) to expand the knowledge of HR scholars and practitioners on the repercussions of macroturbulence for the management and experience of work. In-depth interviews were conducted with 102 academics from UK universities to examine the nexus between COVID-19 and changes to work at meso and micro levels. The findings extend SET and BT by elucidating how complex internal and external social exchange relationships interact more intensely and provoke tensions with a wider array of work-life boundaries during a profound global crisis. Based on these findings, we advance a new analytical framework which provides a deeper and more integrated theorisation of the interrelationship between macroturbulence and changing work-life boundaries. Moreover, we identify implications for practice, which have widespread and ongoing significance given that different types of macro-level change will continue to disrupt working lives.

KEYWORDS
boundary theory, homeworking, social exchange theory, work-life balance

Abbreviations: BT, Boundary Theory; SET, Social Exchange Theory.

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Practitioner notes

What is currently known?

- Human resources engage in social exchange relationships underpinned by mutual expectations and obligations.
- Macro-level turbulence and uncertainty can disrupt these social exchanges and adversely affect work-life balance.

What this paper adds?

The paper provides a new multi-level framework to examine how staff experiences of macro-level crises are shaped by interactions and tensions between:

- A range of different boundaries (e.g., work-life, progression, regulatory, control)
- Complex social exchange relationships between parties (e.g., family members, line-managers, and peers)

Implications for HR practitioners and organisations

- Generic well-being initiatives need supplementing to meet the needs of individual employees, temporary workers, and line-managers, particularly during macro-level turbulence.
- Addressing pre-existing tensions (e.g., over work-life balance) within social exchange relationships is likely to improve responses to future macroturbulence.
- Greater staff involvement in decisions concerning changing working practices should be encouraged to help navigate future crises.

1 | INTRODUCTION

Interest in the role of macro-level turbulence in shaping working conditions and work-life balance is growing, particularly in the wake of recent (inter)national economic crises (Chatrakul Na Ayudhya et al., 2019; Prouska & Psychogios, 2018; Prouska et al., 2016). Such crises can intensify pre-existing tensions in socioeconomic relationships and alter work boundaries and conditions, presenting acute challenges for HR scholars and practitioners to address (Hodder, 2020). As new crises continue to emerge and evolve, we need to extend our knowledge of how different types of macro-level crises influence perceptions and experiences of work and management responses. Thus, we need to move beyond a mono-theoretical lens and adopt a multilevel analytical framework (Ererdi et al., 2020). To our knowledge, this paper is among the first to fuse social exchange theory (SET) with boundary theory (BT) to provide original and significant extensions to the theorisation of macroturbulence and its impact on work and Human Resource Management (HRM).

We focus on the severe turbulence caused by COVID-19 because it precipitated unprecedented change and uncertainty for organisations, HRM and staff (Einwiller et al., 2021; Hodder, 2020). Distinctive features of the crisis have included enforced homeworking for prolonged periods, the disruption of conventional work-life boundaries and the physical distancing of social relationships and exchanges (Anderson & Kelliher, 2020). Thus, we investigated the following research questions as these developments unfolded: How does such macroturbulence shape working conditions, the nature of social exchange relationships and associated boundaries? And how do workers make sense of and navigate these multilevel dynamics?

To address these questions, we used rich data from semi-structured interviews with academics (n = 102) because they engage in important social exchanges with internal and external parties at different levels, and the nature of academic labour, HRM policy and practice in universities is subject to ongoing change (Kalfa et al., 2018).

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The findings make important contributions to the combined extension of SET and BT to better theorise and accommodate the nexus between macroturbulence and meso- and micro-level work and HRM outcomes. We also identify significant implications for future HRM research and practice as the COVID crisis and new ones develop.

2 | AN INTEGRATED MULTILEVEL THEORETICAL PRISM FOR ANALYSING MACROTURBULENCE ON WORK AND HRM

In this section, we set out the theoretical framework for this paper. We then explain the rationale for combining SET and BT to provide a multilevel prism for the theorisation and analysis of macroturbulence on work and HRM.

2.1 | Social exchanges and their boundaries

The core assumption of SET is that in addition to transactional economic exchanges, employment relationships are social exchanges underpinned by mutual expectations and obligations (Cropanzano et al., 2017; Davis & Van der Heijden, 2018). Staff who consider a social exchange relationship with an organisation to be relatively balanced, where organisations provide appropriate social resources and support in return for their labour, are more likely to feel morally obliged to reciprocate through positive and proactive behaviours (Kelliher et al., 2019). In contrast, when they regard social exchanges to be consistently imbalanced and have unmet expectations, this can lead to reduced affective commitment, productivity, trust, and citizenship (Avgoustaki & Bessa, 2019).

Some studies have explicitly applied SET to examine the impact of macroturbulence on social exchange relationships. For example, Huffman et al. (2021) analysed how furlough policies shaped workers' perceptions of the fairness of their social exchange relationship with their employer. During the 2009–2013 economic recession in Greece, Galanaki (2019) found that the benefits employees received as part of their exchange relationship with their employer consolidated their organisational commitment. Meanwhile, Einwiller et al. (2021) concluded from their survey that the clarity and consistency of internal organisational communications influenced workers' perceptions of the social exchange relationship with their employer in Austrian organisations during the pandemic but called for future research to gain more in-depth and nuanced insights.

Blau's (1964) and Emerson's (1976) sociological articulations of SET acknowledge that different parties engage in social exchange relationships at micro and macro levels, such as family members, friends, colleagues, and members of broader international social networks. Research engaging with SET in the context of macroturbulence has primarily analysed dyadic social relationships between employers and/or managers and the people they employ or manage, in some cases focussing on the psychological contract as a strand of SET (e.g., Huffman et al., 2021). Exceptions would include Nyfoudi et al. (2020) and Prouska et al. (2022) who found that co-workers engaged in social exchanges to support each other, navigate changing working conditions and mitigate macroturbulence in Cyprus and Greece. Thus, as social exchanges extend beyond dyadic employment relations, particularly when working from home, we adopted SET in this paper because it provides a broader and more inclusive framework than the psychological contract.

Some scholars have argued that work and employment studies have tended to overlook how imbalanced and consistently contested social exchange relationships are shaped by structural, institutional, and social tensions and ambiguities (Cross & Dundon, 2019; Harney, 2019; Jeske & Shultz, 2016; McDonald & Townsend, 2012). These tensions at the micro (individual), meso (organisational) and macro (external) levels can worsen in a crisis, as employers and workers become more mutually dependent. However, even more collaborative exchange relationships continue to be shaped by patterns of control, conflicting interests, discretion, individual agency, and wider structures (Vincent et al., 2020).

The degree to which workers perceive organisational support for work-life balance to be inadequate can generate antagonism and tensions within social exchange relationships (Kelliher et al., 2019). Research suggests that

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macroturbulence such as economic crises negatively affect work-life interfaces (Chatrakul Na Ayudhya et al., 2019; Hofäcker & König, 2013). However, few studies focussing on macroturbulence and SET have engaged with the concept of work-life balance (Davis & Van der Heijden, 2018).

In this paper, we combine SET with BT to examine work-life interfaces (Delanoeije et al., 2019; Nippert-Eng, 1996). This is because BT encourages a more detailed and dynamic examination of social exchanges at work by segmenting 'work-life balance' to focus on shifting physical, temporal, and psychological boundaries between work and life. Most research examining work-life boundaries has focussed on how individuals engage in 'boundary work' to navigate transitions between family roles and (un)paid work (e.g., Carvalho et al., 2021; Choroszewicz & Kay, 2020). However, as Kelliher et al. (2019) and Allen et al. (2021) have affirmed, we need to embrace a broader conceptualisation of life, which extends beyond fulfiling childcare responsibilities and incorporates additional activities and social relations, such as caring for other relatives and socialising.

Boundary theory is rarely integrated with SET in empirical HRM research, particularly when analysing the impact of macroturbulence on work and HRM. Moreover, studies applying BT in the context of macroturbulence such as COVID-19 have so far been scarce and have focussed mainly on work-family dynamics (Carvalho et al., 2021) or individual boundary management preferences (Allen et al., 2021). Therefore, our application of SET, which focuses on the nature of social exchange relationships between various parties and how they are shaped by tensions and ambiguities at different levels can help expand BT by revealing how physical, temporal, and psychological work-life boundaries connect with a broader range of other context-specific boundaries. The next section explains and justifies the methodology used in this study.

3 | METHODOLOGY

As argued by scholars who have examined how economic crises affect work and HRM (e.g., Chatrakul Na Ayudhya et al., 2019; Prouska & Psychogios, 2018), a qualitative mode of inquiry adopting an interpretivist epistemology offers the scope to inductively uncover and probe the complexities of worker experiences, emotions, sense-making and individual actions. A critical epistemological approach (Edwards, 2017) was also adopted to examine the tensions shaping exchange relationships and boundaries at multiple levels.

3.1 | Sampling and data collection

102 academics (51 females, 51 males) were interviewed using purposive and chain-referral sampling (see Chatrakul Na Ayudhya et al., 2019). Academics from the researchers' immediate networks outside their university were invited to participate. The sample was then built progressively through chain referrals to potential study participants who met the criteria of being academics employed by a UK university who were working from home due to COVID-19.

As with other sampling methods, sampling and participation biases are likely to occur. To minimise the potential for these biases, we interviewed a comparatively large sample of participants for a qualitative interview-based study (Saunders & Townsend, 2016) from different schools and disciplines at different levels of seniority (see Table 1), expressing a spectrum of views. Eighty-one percent of the participants had more than 5 years of experience in academia before COVID-19 and therefore could reflect on their experience of turbulence when the study was conducted.

The majority of participants were from business and management schools (n = 71), and 31 were from other fields and types of schools (see Table 1). The challenges of working remotely were broadly similar across the schools sampled. A comparative study was beyond the scope of this paper, but some differences are worth noting. For instance, business schools often have a higher proportion of international students than other schools in UK universities. Indeed,

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TABLE 1 Sample breakdown

Seniority	*N*	Types of schools or departments: Female	Male	Business and Management Schools	Other schools or departments (Health, Social Policy, Sociology, Sports Science, Psychology, Politics, Geography, Chemistry, Languages, Arts, Film & Media and Data Science)
Dean	2	2	0	2	0
Professor	22	10	12	21	1
Reader	2	2	0	0	2
Senior lecturer	29	14	15	19	10
Lecturer	30	13	17	19	11
Research and teaching fellows	17	10	7	10	7
Total	**102**	**51**	**51**	**71**	**31**

TABLE 2 Monthly breakdown of the interviews conducted during 2020 with 102 participants

Month	Number
February	**7**
March	9
April	33
May	22
June	27 (1 was a follow-up interview)
July	5 (2 were follow-up interviews)
August	2
October	4 follow-up interviews
November	2 follow-up interviews
December	1 follow-up interview

the challenges of time zone differences and language barriers when interacting with students during online classes or one-to-one meetings were highlighted by a greater proportion of participants working in business schools. Participants in other schools faced different challenges, for instance when equipment was used during teaching (e.g., chemistry or film and media) or where work placements were an important part of a course (e.g., nursing, psychology).

The interviews were part of a broader project conducted in 2020 focussing on changing work arrangements and HRM in academia. Table 2 shows a monthly summary of the interviews. Out of the 102 participants, 10 were interviewed before 23/03/20 when the first national lockdown was imposed. At this point there were concerns regarding how COVID was circulating in the UK, many international students were unable to leave China and there had been discussions around how teaching delivery may need to change. These participants were then interviewed a second time after 23/03/20 (shown as 'follow-up interviews' in Table 2) to gather their experiences of working from home during the lockdown, a topic that was not discussed in their first interview. In addition to the 10 follow-up interviews, 11 of the participants were contacted again during the analysis stage to confirm a point made in their initial interview and then clarify or expand on it. This was done by e-mail (eight participants), or by asking a small number of follow-up questions through Zoom (three participants). For instance, a participant stated in their initial interview that homeworking could be beneficial and another participant stated that homeworking deteriorated for them over time, but their experiences were not adequately probed in their initial interview.

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The following types of questions were posed in the interviews. How has homeworking during COVID impacted you? How often did you work from home previously? How have you experienced online teaching? How have you experienced online meetings? How would you describe your relationship with your line manager/colleagues/students during this period? Have you been balancing caring responsibilities with work? How have you experienced not being able to meet wider family and friends in-person? Have you adopted any strategies to deal with the challenges you have faced? How has the university or its HR department offered support during this period? In line with a semi-structured interview approach, these types of questions were supplemented with questions to probe the participants' responses accordingly.

The interviews lasted an average of 63 minutes and were conducted mainly online or by phone because of the need for physical distancing. The interviews were digitally recorded, and the data obtained were fully transcribed and checked for accuracy before being analysed.

3.2 | Data analysis

A thematic template-based approach was used to systematically analyse the participants' perspectives because of its flexibility to oscillate between the interview data and the literature (King, 2012). We created a preliminary template to code four transcripts and then asked third-party colleagues to code the anonymised interview transcripts without the preliminary template. This process enabled us to check the initial data coding and minimise the potential for confirmatory biases to affect the coding. We then discussed potential differences in the coding and made minor adjustments where needed.

NVivo12 was used to complete the coding and analysis. The authors reviewed, discussed, and refined the coding structure and node labels of the first five transcripts. After coding 20 transcripts, the authors rechecked and discussed the coding in detail. This progressive and iterative review process helped minimise the potential for the reliability and rigour of our coding to wane over time (coding drift) and continued until all the transcripts had been fully coded. Figure 1 sets out the coding structure.

As indicated in the Findings section, the coding process suggested that gender influenced the participants' responses with regard to caring responsibilities. Additionally, 31% of the respondents were non-UK nationals and therefore more likely to have family outside the UK, which generated different challenges for them during COVID-19. A limitation of the study is that 88% of the participants were white. The participants discussed the pre-existing progression challenges BAME academics face, but more BAME participants could have provided an insight into how ethnicity influenced faculty experiences. The next section reveals the participants' experiences of homeworking on an enforced basis.

4 | FINDINGS

The findings are divided into three thematic sections examining the respondents' experiences of homeworking during the turbulence caused by COVID-19 and enforced lockdowns. The data elucidates how experiences of macroturbulence were shaped by social exchange relationships and different boundaries at multiple levels.

4.1 | Enforced homeworking under rapidly changing scenarios

Twenty-six of the participants reported that the time and cost savings from not commuting to work were significant positive spill over effects of working from home. Some of those who worked in their university office regularly before

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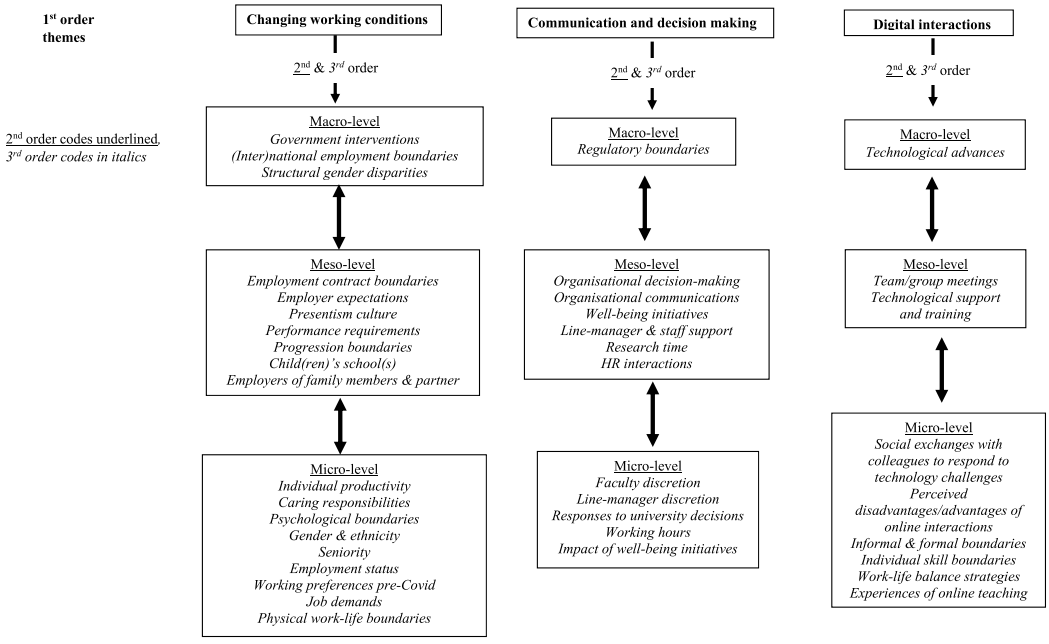

FIGURE 1 Interview and documentary data coding structure

COVID-19 stated that micro-level social relationships and exchanges with colleagues or line managers often made it difficult to maintain existing time boundaries, and so increased their workloads and prolonged their working time.

> If you're in your office, you're more likely to be asked to do something extra, either from a colleague or manager and you want to help them out but considering everything else we have to do … and it tends to be the same people who pick up the extra stuff.
>
> (P13, Professor)

Furthermore, in some universities, a meso-level presenteeism culture and/or heavy teaching loads placed pressure on staff to regularly work onsite before COVID-19, generating tensions over personal and professional discretion and work-life balance. Homeworking changed the nature of these tensions by reconfiguring physical work-life boundaries and could provide staff with greater discretion over how they spent their time.

Sixty-two of the participants regularly worked from home before the crisis, which potentially made the transition to homeworking easier. However, a key theme in the interview data was how the spill over effects of working at home and micro level personal control over boundaries to the temporality of work depended on individual circumstances and working environments.

Macro-level regulatory boundaries prevented individuals from leaving their home to engage in physically proximate social relationships and exchanges with wider family and friends, some of whom were living outside the UK. COVID-19 also prompted the UK government to suddenly close schools as part of the national lockdown and advise vulnerable individuals to protect themselves. Participants discussed the challenges of balancing expectations within social exchange relationships with their employer and those with individuals who they were caring for (29 participants) and/or those with their partner, wife, husband, wider family, and friends (50 participants). The spill over effects from COVID-19 and homeworking generated tensions and threw work-life boundaries into a new state of flux.

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> Tensions within work or family relationships can easily arise … Academics are in survival mode. Even getting food for themselves, their partners their families is a challenge. Everyone has different responsibilities outside work that they're trying to balance.
>
> (P46, Professor)
>
> Working from home is nothing that new. What's new and problematic is that I've got three young children who are not at school or nursery, and they've gone feral. They're down here every few minutes … I'm probably 30% of what I should be productivity-wise.
>
> (P31, Senior Lecturer)

The physical and psychological space the participants had to do their work at a micro-level was affected by the size and layout of their home and how the available space(s) were being used for multiple purposes. In some cases, a spill over effect was the blurring of the boundaries between the work and occupations of different household members, because family members or partners were suddenly working from home at the same time.

> I'm quite used to homeworking, but it's completely different when there are three of us now homeworking, and we can't go anywhere else. We have different jobs, but we all need to make calls, attend online meetings, use the Wi-Fi constantly. Some rooms are better for Wi-Fi than others, so we're having to work out who's working where.
>
> (P41, Senior Lecturer)
>
> Even if you've finished work for the day, you're then eating your dinner in the same place that you were working all day, so that kind of blurring happens not just in terms of the activities that you're doing but your sense of where you are.
>
> (P8, Lecturer)

The physical and psychological segregation of work and life improved over time for some, as they were able to set up home offices or became more accustomed to their new work-life arrangements. Twenty-one of the participants reported experiencing severe anxiety, which affected their productivity, but for most of the participants, this anxiety dissipated over time. For other members of the sample, homeworking was becoming more rather than less problematic.

> Initially colleagues were very positive, but not so much now. I think some of that is to do with people's mental health … at home … my e-mail is [full up with messages from] very tired, frustrated, and annoyed colleagues.
>
> (P4, Senior Lecturer)

About 22% of the male participants struggled to balance their work and caring responsibilities compared with 35% of the female participants. Most of the participants acknowledged that their female colleagues tended to encounter more difficulties than their male colleagues in reconciling social exchanges with family members and the demands of their job during the crisis. This could spill over and affect their progression through meso-level professional seniority boundaries and exacerbate pre-existing structural gender disparities over the short- and long-term.

> I think we've seen … a gender difference playing out where women are finding it much less straightforward to say, 'Well, I'm going to prioritise research within my time'. And we're seeing this to an extreme at the moment, where I'm hearing predominantly from male colleagues that they have never been able to do as much research. And then female colleagues just pulling their hair out about the teaching and assessments they've got at the moment on top of caring responsibilities.
>
> (P45, Dean)

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Pre-existing tensions around the challenges of progressing through meso-level seniority boundaries and meeting performance requirements triggered concerns particularly among more junior staff that they needed to move forward despite the disruption they were facing. In addition to gender, 30% of the BAME participants discussed how these pre-existing tensions and progression challenges could be influenced by ethnicity. A small number (n = 2) of the total sample (n = 102) stated that they had had discussions on how the spill over effects of the crisis would be considered when it came to their career progression to support staff within changing social exchange structures and relationships.

The crisis also exposed pre-existing tensions around macro-level casualisation. Fifty-three percent of those on temporary contracts were nearing the end of their contracts. The following quote exemplifies how a research assistant sought to apply micro-level strategies to manage employment boundaries and balance social relations and exchanges at work and home.

> You're always a parent and always a worker the whole time. It's so overwhelming … but you've got to keep going. My husband has been working Monday, Friday and Wednesday afternoons, and I've been working Tuesday, Thursday and Wednesday mornings, but I'm working 8:00 a.m. to 10:00 p.m. Last night, I worked on a job application … until midnight.
>
> (P30, Research Assistant)

This thematic section has focussed on how the participants experienced change and uncertainty in different ways during the turbulence of the COVID-19 crisis. The next examines how the universities responded to this unfolding context for work and HRM.

4.2 | Communication and decision-making during the pandemic and lockdowns

Macro-level government interventions meant that some decisions regarding university operations were outside a university's boundaries of control. Nevertheless, a range of communication approaches were adopted, as exemplified by the following account:

> I would say the university is doing quite well … There's constant communication, and it's quite open. Although it's quite scary, they have been very transparent in terms of the financial situation. The communication contrasts significantly with my previous university.
>
> (P20, Senior Lecturer)

Fifty-one of the participants stated that their micro-level control boundaries were affected by top–down communications, as illustrated in the following expert. This was perceived as an unfair social exchange with their employer and spilt over to affect social relations and exchanges between different parties as information was cascaded hierarchically.

> Decisions have been made centrally, which then get reinterpreted at school level. And then they get reinterpreted at division level, so there's been so much confusion … there have been a number of things that have come up, mostly around teaching, when students have asked questions. But also around things like leave … and stuff like that. No one is quite sure what's going on, and … it depends who you ask, what the answer is.
>
> (Professor, P11)

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The relative clarity of university communications could spill over to shape temporary staff perceptions of the longevity of exchange relationships with their employer. A senior lecturer who was a programme director (P40) explained how he engaged in social exchanges by reassuring those who felt their university jobs were already fragile:

> I had to have a conversation with my two youngest members of staff to reassure them because of a not-very-well-worded university disclosure. If you read it at first glance without knowing any [details], it basically said we're going to follow with redundancies, which is not the case at all.

Most of the participants stated that their universities sent communications advising staff to focus on their welfare while working from home, which could be interpreted as an attempt by universities to support perceptions of reciprocal social exchanges. Some identified a shift in meso-level university expectations and control strategies following resistance from colleagues because of their perceptions of continuing and/or increasingly disparate social exchanges.

> At first, they said, 'We expect staff to work diligently and deliver', but then the university were basically inundated with e-mails saying, 'How do you expect that to happen?' It's only the government that can reopen schools and nurseries. Some people might have time on their hands but not everyone. Then they sent an e-mail recognising that we cannot work to full capacity and saying they just expect us to do what we can.
>
> (P6, Senior Lecturer)

Well-being days were also introduced at some of the participants' universities, including additional leave or specific days in the week without e-mails and meetings, which provided some with relief and the scope to use these sanctioned temporal boundaries to manage the conflicting pressures they were facing. However, many stressed that these meso-level well-being initiatives were undermined by the volume of work they were simultaneously expected to complete and the demands of different internal and external parties, with limited meso-level support and resources in place.

> There's a difference between the rhetoric and what I feel the real expectation is … I haven't stopped. I've had loads of deadlines. I've been working weekend after weekend.
>
> (P19, Lecturer)
>
> We get these university communications about well-being, but then you get another e-mail from someone else with a deadline … or needing something and students e-mailing you left, right and centre. So there's a disconnect.
>
> (P28, Professor)

Furthermore, these well-being communications were mainly sent from the leadership of their respective universities rather than their HR departments. Indeed, most reported that HR had effectively faded into the background and had been playing a nominal role in shaping the emotional and practical support available to staff within work-centred exchange relationships.

> For me, this would have been the perfect time for HR to really consolidate or elevate its position beyond this kind of bureaucratic or managerial role to really start to engage with people about how you are coping with all this stuff. Do you need support ideas? Do you need someone to talk to honestly about how you feel in yourself? How you're dealing with childcare? Home schooling? Whatever it is?
>
> (P23, Senior Lecturer)

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Sixty-five of the participants discussed how line managers faced challenges navigating tensions within social exchange relationships, meso-level university communications, decisions, and control boundaries. Ten of the participants were senior leaders at school-level and mid-level leaders at a broader university-level (Deans, Associate Deans) or line managers (department/group heads) themselves. In some of the participants' universities, research time allocations were curtailed to prioritise teaching. This included cancelling or postponing sabbaticals. A business school Dean explained how she had tried to resist reductions in research time allocations because giving research time 'back' to staff would be unrealistic in practice given the nature of academic work.

A line manager noted how prioritising teaching over research was likely to spill over to affect progression through seniority boundaries (P18, Professor). This was because this impacted on exchange relationships between academics and their employer, line manager and colleagues.

> It's a complete nightmare for progression issues because we've been told that research isn't prioritised, teaching is the priority, and … we're not doing our annual performance reviews as a result. That means there's a chunk of people who would have been hoping for promotion … who are probably not going to have any mechanism to do that.

As exemplified below, line manager approaches to influence social exchange relationships varied dramatically. Managers who were committed to supporting the wide-ranging and changing needs of staff and students also needed support. However, individual managerial approaches could generate tensions and challenges.

> My line manager does everything he can, and he has kids. It's middle managers at different levels that have to negotiate that messaging … it's terrible because it puts all the pressure on them. They need support.
>
> (P34, Lecturer)

> I genuinely feel like I'm in the middle of a swimming pool, struggling, and management are standing around the outside of the pool, congratulating me on how well I'm doing for not drowning and managing to just about get mouthfuls of air, and no one is swinging a chair in so that I can hang onto it. I'm surrounded by other colleagues who might be treading water, or they might be drowning like I am, or some of them seem to be floating about, smoking cigars, having quite a nice time.
>
> (P9, Senior Lecturer)

The crisis reconfigured boundaries and social exchange relationships between colleagues and students by enforcing online communication. The next section reveals the tensions underpinning the participants' experiences of digital interactions during the crisis.

4.3 | The shift towards exclusively digitalised interactions

Most participants highlighted the challenges of digital interactions during the crisis. A key issue revolved around micro-level informal interactions, which played a major role in social exchanges among colleagues to share information and ideas but tended to be more difficult and time-consuming online. Moreover, six of the recently appointed participants explained the challenges of interacting online when they had not yet met colleagues in-person.

Some of the interviewees appreciated how opportunities to participate in online meetings and events had increased meeting attendance and could potentially help realign the boundaries between staff and university control over their work-life balance in the future by reducing the need to travel to work as often, which may then spill over to support the perceived fairness of exchange relationships with their employer. Others were less enthusiastic about

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these boundary changes, emphasising the reduced visibility of body language indicators and the more draining nature of long and/or successive online meetings compared with interspersed in-person meetings.

Furthermore, homeworking also exposed meso- and micro-level tensions around meetings and digital communications, which pre-dated the crisis and could create perceptions of inequitable social exchange relationships. Thirty-six of the participants said that the number, length and structure of compulsory online/in-person meetings organised by different individuals within universities needed to be re-evaluated in the future, as they continued to cross temporal and locational work and control boundaries.

> So we're in this global pandemic, and the first thing universities want to do is have lots of meetings again, virtual meetings rather than physical meetings, but there's no need for a lot of these meetings. It's different people trying to over-control things.
>
> (P50, Professor)

The participants explained how some line managers organised online meetings to communicate relevant information and identify staff needs. Others organised too few, which meant workers lacked support within the social exchange, or too many, which was perceived as a means of exercising control.

> We've been having team meetings every week, which is more than we ever had before, and I'm finding them more frustrating because we would never normally see each other that much, and so it's more work again.
>
> (P16, Senior Lecturer)
>
> We didn't have a department meeting for the first [six] weeks. In the end, I organised something informal because people needed support.
>
> (P9, Senior Lecturer)

Digital interactions could extend working hours for those with or without formal managerial responsibilities. This was due to differing temporal availability and academics seeking to balance social exchange relationships with multiple parties.

> Some meetings, I've logged into in the middle of the night because I'm outside of the UK [because of caring responsibilities], but when they're unnecessary, I'll just turn my camera off and try to stay awake.
>
> (P87, Professor)
>
> You sort of feel a bit like you're chained to your computer or mobile phone. People [contact] you on your own personal mobile, and you're getting either WhatsApp messages or phone calls about work on a Sunday morning, and it's just a bit much. It's not always important stuff.
>
> (P22, Senior Lecturer)

Many of the participants implemented micro-level strategies to manage work-life boundaries, which were in some cases developed with colleagues as part of social exchanges. Since the outbreak, some had set up out-of-office messages after 5 p.m. on weekdays and over weekends, made internal/external colleagues and students aware of their caring responsibilities in their e-mail signatures, deleted e-mail apps from their personal phones, set their status to 'appear offline' when using Microsoft Teams or avoiding signing in unless for scheduled meetings, turned their camera off in meetings, refrained from attending unnecessary meetings or used different technologies and software to segregate work and life (e.g., the use of a laptop for work and a tablet outside working hours).

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Only seven participants had significant experience in online teaching before the enforced homeworking. Meso-level technological infrastructure was highlighted as an important source of support within the social exchange with their employer but varied across institutions and exposed pre-existing tensions.

> You need robust platforms, and you need learning technologists. We haven't even got one learning technologist within the school. There are a few in the university, but we haven't got their services, so we're kind of scratching around.
>
> (P49, Professor)

> Our IT people at the moment are amazing … There are dedicated people to help us. But … those people in IT [whom] we're completely dependent on are going through a review at the moment to see if their service can be centralised, which means less staff.
>
> (P10, Professor)

Many participants felt that universities needed to acknowledge micro-level skill boundaries and that the provision of training to upskill staff may be required to support social exchange relationships. However, many did not have time to attend relevant training and use technology innovatively before COVID-19, so the increased workload and turbulence they were facing further disrupted their temporal and work-life boundaries.

> I'm not particularly techy. I've come from a generation where there were no computers. I found moving to remote working quite challenging because it's very time-consuming. There has been a reluctance by the institution prior to this to actually train people and give them an opportunity to make their lives more accessible to these technologies.
>
> (P5, Senior Lecturer)

Where meso-level technological support was lacking and university communications unclear, the participants explained how they established or re-enforced informal networks and engaged in micro-level social exchanges with colleagues. As one of the participants stated:

> Everyone in the division [is] running around, thinking of really useful things to do, and people with five or ten minutes of experience on Zoom are passing on their vast knowledge to everyone else. We're all sharing our accounts and setting up meetings for other people. We're all helping each other teach online. I've stood in for a couple of colleagues who were ill with COVID-19.
>
> (P37, Professor)

However, such collegiality could make it difficult to preserve micro-level research time boundaries and extend working hours. This is exemplified by the following participant's account:

> What I'm doing now … will hopefully help colleagues. But then I do get resentful when I know people are just keeping their heads down and writing lots of papers and I'm not.
>
> (P49, Professor)

This section has shed light on how enforced homeworking and the macroturbulence generated by COVID-19 affected HRM, working conditions and individual experiences in disparate ways. These dialectics and spill over effects were steered by the nature of social exchange relationships between multiple parties and a range of boundaries spanning different levels.

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5 | DISCUSSION AND CONCLUSIONS

The findings from this study identify three main contributions to extend the theorisation of the impact of macroturbulence on worker experiences and HRM. First, the paper proposes and empirically applies a relational multilevel framework integrating SET and BT. Boundary theory can be applied to examine changing physical, temporal, and psychological work-life boundaries (Delanoeije et al., 2019). However, it lacks a focus on the nature of social exchange relationships and individual perceptions of obligations and expectations, which SET provides (Blau, 1964; Cropanzano et al., 2017; Prouska et al., 2022). As shown in Figure 2, we identify a range of social exchanges and boundaries that cut across the work-life interface at different levels. Perforated lines are used in the figure to reflect permeable social exchanges between boundaries and levels. We argue that how these boundaries and exchanges interact and generate spill over effects should be an important focus for future research.

Second, as Figure 2 shows, our framework explains the complex interplay between structures and agentic behaviours, which are usually overlooked in empirical HRM research applying SET or BT in the context of macroturbulence as well as more broadly (Cross & Dundon, 2019; Harney, 2019). The findings revealed how staff experiences of working remotely during the pandemic were shaped by tensions relating to macro-level structures such as government regulations, gender inequalities, casualisation and meso-level organisational structures connected to progression, workload allocation, technological support, and decision-making. The findings also capture agency dynamics within these structures, such as how individuals applied strategies to navigate or counter the realignment of exchange relationships or the infringement of work-life boundaries.

Relatedly, the paper probes the intricacies underpinning the boundaries of organisation and staff control. During the pandemic, the boundaries of a university's control were constrained by regulatory structures and the intensification of pre-existing economic conditions (Thompson, 2013), but most of the participants felt that universities had the discretion to shape their communication strategies and the nature of decision-making. Top-down decision-making created perceptions of less equitable social exchanges. The way line managers used their agency to filter and navigate university communications and decisions and the level of support they received within segmented organisational structures varied and added to the complexity of fostering positive social exchange relationships with staff. Moreover, although opportunities to engage in online rather than in-person interactions at work could potentially enhance the quality of social exchange relationships between peers and managers by extending individual control over work-life boundaries, we capture how staff experiences are far more complex when homeworking is enforced (Anderson & Kelliher, 2020).

Third, the paper sheds much-needed light on the uneven impact of a macro crisis at the meso and micro levels. This contributes new insights into research identifying the significance of individual circumstances in the context of an economic crisis (e.g., Chatrakul Na Ayudhya et al., 2019) and into the growing literature challenging the notion and effectiveness of universal best-practice HR (Cafferkey et al., 2019; Harney, 2019). As shown in Figure 2, staff experiences during the pandemic stemmed from the confluence between individual circumstances and meso- and macro-level factors, including the demands of exchange relationships with numerous parties, such as internal and external colleagues, line managers, students, partners, family members and other members of society. Importantly, colleagues helped others without any guarantee their support would be reciprocated in the future. COVID-related deaths rose rapidly, and some participants referred to colleagues or relatives they had lost or had suffered from COVID-19. Therefore, the concept of reciprocity embedded within SET is more nuanced than typically presented in the literature, particularly in turbulent crises when greater social exchange is needed. Tensions between social exchange relationships and boundaries can produce micro-level spill over effects that are not always obvious to colleagues, line managers or employers, especially if staff remain silent (Prouska & Psychogios, 2018). For instance, some participants lived alone and had physical and psychological space to work but worked evenings and weekends because of social exchange relationships and progression boundaries, thereby affecting their well-being. The findings also highlight the need to examine how macroturbulence impacts temporary workers, who are often neglected in research applying SET or BT.

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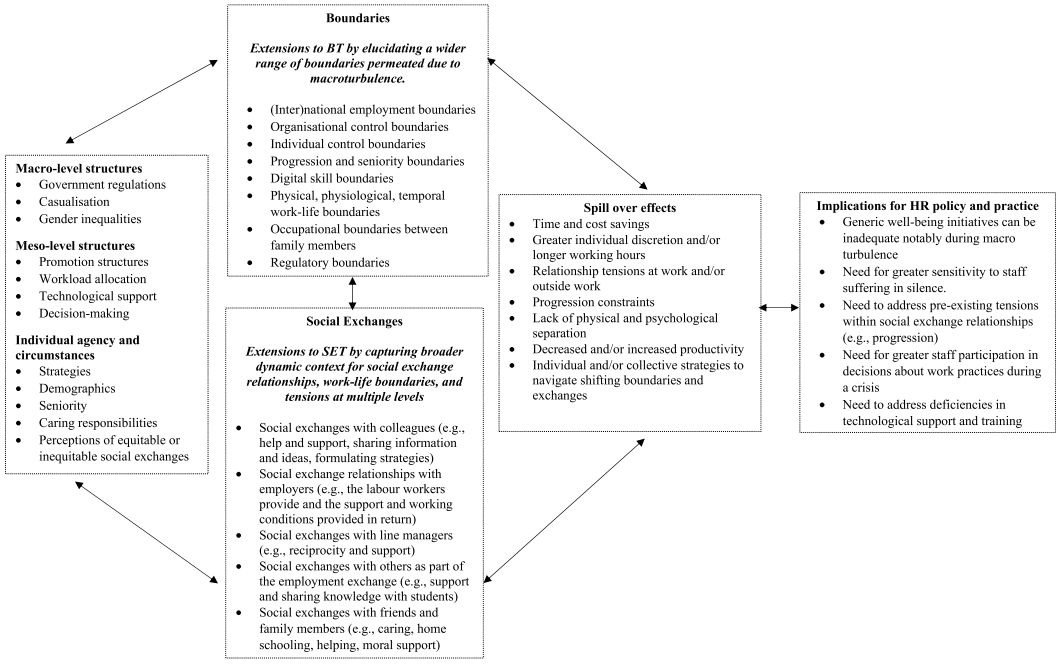

FIGURE 2 Theorising and analysing experiences of macroturbulence on work and HRM by fusing boundary and social exchange theory

The findings generate implications for work and HRM in the higher-education sector, which are likely to resonate more widely. Notably, during macroturbulence, generic well-being initiatives are unlikely to address individual worker and line manager needs when they seek to manage exchange relationships and boundaries, particularly when they may be suffering in silence. Importantly, addressing pre-existing tensions within social exchange relationships between staff and their employer, such as around progression structures, is likely to shape staff experiences of future turbulence. Moreover, individual agency needs further consideration particularly regarding the agency employers have despite structural constraints to provide greater staff participation in decisions about work practices during a crisis, along with staff agency to resist inequitable exchange relationships individually or collectively. Finally, if organisations further incorporate technology into working practices in the aftermath of COVID-19, greater employer awareness of deficiencies in technological support and training must be raised, including how the extent of digital interactions shapes staff experiences and productivity as well as the perceived necessity of interactions at different points in time.

The main limitations of the study were the exclusive focus on academics and the size and nature of the sample, which was uneven across schools. The potential biases of the researchers, who were homeworking during the outbreak, are acknowledged. However, we sought to minimise these limitations by building a large sample of participants with different views and asking third-party researchers to review our interpretation of the data.

Future research could adopt single- and multi-case study approaches to identify similarities and variances in the impact of such turbulence and homeworking on HRM across occupations, industries, and countries. Analysing how the nature of social exchange relationships interact with multiple boundaries to shape worker experiences of HRM during other crises is also important to better understand the multilevel impacts of subsequent turbulence.

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CONFLICT OF INTEREST

No conflict of interest in producing this paper and there was no funding.

DATA AVAILABILITY STATEMENT

The data are unavailable due to privacy/ethical restrictions.

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SPECIAL ISSUE ARTICLE

Creativity development and Mode 2 theory development: Event system and experiential learning perspectives

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Abstract

Literature on academic-stakeholder collaboration in the context of HRM is scarce and highlights the challenges linking theory to practice. Drawing on Mode 2 research, we theorise how a structured intervention enables the generation of theoretical insights concerning the development of employee creativity knowledge, skills, and attitudes (KSAs). Utilising event system theory, we reveal how the novelty, criticality, and disruption of a structured intervention fuel an experiential learning process. This process facilitates the development of important individual and team-based creativity KSAs and is sustained through a learning mindset. We develop insights about theories-in-use, HRM theory development, and the micro processes involved in an academic-stakeholder collaboration including areas of potential tension. From a practice perspective, we highlight the value of structured interventions for creativity KSA development and a strategy to facilitate academic-stakeholder collaboration.

KEYWORDS
academic-stakeholder collaboration, creative problem-solving, event system theory, experiential learning process, structured intervention, theory development, theory-practice divide

Abbreviations: CPS, creative problem-solving; HR, Human resource; HRM, Human resource management; KSA, Knowledge, skills, and attitudes.

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Practitioner notes

What is currently known about the subject matter?

- Research highlights models and processes to undertake academic-stakeholder collaboration, yet few studies report the outcomes of these collaborations for theory development.
- Research highlights that organisation can use different types of interventions to develop creativity knowledge, skills, and attitudes (KSAs).
- Action research has emerged as a popular form of academic-stakeholder collaboration; however, few studies have focused on a structured intervention to develop theory.
- Research on the outcomes of academic-stakeholder collaboration in HRM is embryonic.

What the paper adds to this?

- The paper utilises event system theory to conceptualise the contribution of a structured intervention to the development of theory about creativity KSAs in organisations.
- The paper provides important insights concerning the micro processes of academic-stakeholder collaboration including areas of potential tension.
- We develop important insights about the role of learning mindset, individual and team-based concrete experiences, and the centrality of creativity artefacts and creative problem-solving techniques for the development of creativity KSAs.
- We develop insights about the role of theories-in-use in developing theory in HRM.

What are the implications for practitioners?

- Our findings highlight the value of structured interventions as events to activate cycles of experiential learning that lead to the development of creativity KSAs.
- Learning mindset emerges as an important individual characteristic that helps to sustain individual and team-based experiential learning processes, and which leads to creativity KSA outcomes.
- The development of creativity KSAs involves multiple individual and team-based experiential learning cycles in the workplace supported by a positive work environment.

1 | INTRODUCTION

Scholars highlight the benefits of Mode 2 research (Guerci et al., 2019), defined as research which is non-linear, transdisciplinary, and which involves co-production by stakeholders and academics (Swan et al., 2010), in the context of the HRM discipline. Yet, efforts to undertake this type of research in HRM are modest (Bleijenbergh et al., 2020; Chang & Chen, 2011) with various reasons suggested for the lack of progress. These reasons include that both HRM academics and stakeholders have different priorities (Sætre & Van de Ven, 2021), with scholars being less interested in practical knowledge (Leppäaho et al., 2021), and the notion that HR stakeholders are less willing to engage with researchers because they view the collaboration as a potential threat (Gill, 2018). Bartunek and Rynes (2014) suggest that another possible reason for the lack of progress is that too much emphasis has been given to the 'gap' and 'bridging the gap' rather than viewing the gap as being of fundamental importance to research and theorising. Such an approach, they argue, has as its central notion the idea that academic-stakeholder collaborations are essentially tensional and subject to paradox. Therefore, academic-stakeholder research should prioritise the surfacing of these tensions to advance theory building and the use of theories-in-use to generate important theoretical insights that are of value to stakeholders. Potential tensions that emerge include differences in logics, time dimensions, the communication of research findings, the motivations and priorities of academics and stakeholders, and what constitutes rigor

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and relevance. This suggests that both academics and stakeholders should choose collaboration mechanisms that enable them to work, understanding these tensions (Bresnen & Burrell, 2013; Wickert et al., 2021).

HRM scholars have proposed different approaches that potentially can be used as a framework to explore these tensions. These approaches include action research as a strategy for collaboration (Bleijenbergh et al., 2020), phase-based frameworks (Guerci et al., 2019), and networks (Coughlan et al., 2021). Many of these suggestions have the potential to operate at the micro level and therefore illuminate these tensions, yet they are criticised for focusing too much on the gap (Bleijenbergh et al., 2020), and the generation of solutions. These approaches also potentially place the emphasis on the priorities of the organisation rather than the development of theory and focus on the elites in organisations ignoring powerless actors (Bresnen & Burrell, 2013; Swan et al., 2010). In this paper, we propose that structured interventions defined as a small-scale academic-led process, comprising pre-assessment of learning needs to address a specific organisational problem, the use of structured classroom-based activities, and the initiation of experiential learning processes, have the potential to anchor Mode 2 research in the day-to-day reality of organisational practice and facilitate the generation of theories-in-use which can contribute to the development of HRM theory. Structured interventions are narrower in scope than action learning projects and 'can target individuals, groups, or whole organisations, and aim to improve individual, group, and/or organisational outcomes… by promoting positive outcomes' (Thiele Schwarz et al., 2021: 415) while at the same time providing the potential to explore tensions in the context of academic-stakeholder collaborations.

We first investigate the use of a structured intervention focused on the development of employee creativity (Hirudayaraj & Matić, 2021) as a basis to develop HRM theory from stakeholders' theories-in-use about the experiential learning process that underpins the development of creativity knowledge, skills, and attitudes (KSAs), and second, we develop insights about the complexities of academic-stakeholder collaborations using a structured intervention approach. Employee creativity, which we define as the individual process of developing novel and useful ideas concerning processes, services, and procedures (Wang et al., 2018), is critical for organisations to foster innovation (Shipton et al., 2017) and can be developed under favourable organisational conditions (Han & Stieha, 2020), however, it is still not clear how the process of creativity development can be operationalised. To develop insights on both creativity and theory development, we utilise an event system perspective (Morgeson et al., 2015). This is a good fit theory in the case of our structured intervention because it captures context in theorising (Johns, 2018) and provides insights into the impact of interventions as events (Chen et al., 2021; Valgeirsdottir & Onarheim, 2017) on both the development of creativity KSAs and the generation of theory on academic-stakeholder collaborations. We theorise those structured interventions can be conceptualised as events because of their novelty, criticality, and disruption within an organisation. Structured interventions are novel because for employees they are unexpected and unusual in organisations (Morgeson et al., 2015); they are critical in that they focus on the development of creativity KSAs, something considered essential for day-to-day performance and a major strategic priority in organisations; and they are disruptive in that they require employees who participate in these interventions to change their approach to creativity and do things differently (Birdi, 2016). The notion of disruption is central to the idea of interventions and was emphasised by Argyris (1970) in his original conceptualisation of an intervention where he articulated its purpose as disrupting the status quo.

We rely on this theorising within the Mode 2 research perspective and conducted a structured intervention in four hospitality organisations. As part of this structured intervention, we utilised multiple types of data collection methods, such as structured pre- and post-workshop surveys, observations during the workshop, and post-workshop semi-structured interviews to ensure both method and source triangulation. The evidence generated allowed us to explore two research questions: (1) *What is the impact of structured interventions on the development of employee creativity KSAs and the nature of the experiential learning process?* (2) *What are the micro processes in structured interventions that contribute to both stakeholders' theories-in-use and HRM theory development?*

We make three important contributions to the literature. First, we contribute to the literature on employee creativity KSA development (Wang et al., 2018). Creativity is a critical part of job functions for employees in service organisations and there is significant scope to expand our knowledge concerning the types of interventions that

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can accelerate the development of necessary KSAs. We specifically develop insights into the experiential learning processes involved in the development of creativity KSAs (Markowska & Wiklund, 2020). Second, we make an important contribution to understanding the dynamic micro processes inherent in a structured intervention for Mode 2 purposes. We do so by unpacking five complexities identified in our academic-stakeholder collaboration. Third, we illuminate how these micro processes aid to develop stakeholders' theories-in-use and subsequent HRM theory, and how this plays out in an organisational setting involving academics and stakeholders. In doing so, we advance insights on the interplay of stakeholders and academics in the context of structured interventions, the importance of considering different theoretical lenses, and the balancing of both academic and stakeholder perspectives.

2 | LITERATURE REVIEW

2.1 | Event system theory and academic-led structured interventions

Event system theory presents an important theoretical suggestion that structured interventions can be understood as events and the characteristics of these events impact employees' behaviour (Jiang et al., 2019; McFarland et al., 2020). The theory proposes key event strength characteristics, *novelty*, *criticality*, and *disruption*, impacting the way in which employees behave in an organisation (Morgeson et al., 2015). Event novelty emphasises the extent to which an event is different or departs from current or past ways of doing things. Novelty helps the event to stand out and elevates its potential to trigger change or processes of learning (Morgeson et al., 2015). For example, novelty may be concerned with something that is new to the organisation such as a process, practice, or system. Criticality as a characteristic of events is concerned with the extent or degree that the event is important to the organisation and that it is a strategic priority. For example, the survival of the organisation depends on doing something different or taking a different strategic path. Where an event is viewed as critical it will be perceived by an employee as both salient and requiring their attention. Disruption captures or reflects a discontinuity in the organisation and where something has changed. It essentially characterises a situation where things will have to be done differently and requires the abandonment or transformation of organisational routines to adjust and adapt (Morgeson et al., 2015). Disruption is typically conceptualised as a major disturbance in the environment such as COVID-19 or significant change in an organisation's customer base. We propose that the structured intervention that is the focus of this paper can be described using these three characteristics.

(1) *Novelty*. We conceptualise a structured intervention as novel to the extent that it is a high-profile way for an organisation to have employees engage with creativity as part of the routines of the organisation and make it a key component of their role. The very act of bringing in academics to the workplace and publicising the event and their involvement introduces novelty in that it is a departure from what was done previously. (2) *Criticality*. A structured intervention can be considered critical in the sense that the development of creativity is of strategic relevance for the competitiveness of an organisation (DeRue et al., 2012). Given the criticality of employee creativity KSAs to the development and delivery of novel customer solutions in the service sector, the intervention can have the effect of gaining the attention of employees through each organisation. (3) *Disruption*. The structured intervention can be considered disruptive in the sense that it requires employees to develop new KSA outcomes. These outcomes can be developed using learning methods such as brainstorming, synectics, morphological analysis, lateral thinking, theory of inventive problem solving, and creative problem-solving (CPS; for a review, see Birdi, 2016). They have the effect of taking employees out of their comfort zones, presenting them with a new reality and emphasizing that things will be different. The multiple cycles of experiential learning activated by structured interventions can fundamentally change creativity KSAs and 'develop an individual's capability to generate novel and potentially useful solutions to (often complex and ill-defined) problems' (Birdi, 2016: 298).

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2.2 | Structured interventions as Mode 2 research

We argue that academic-led structured interventions meet the requirements of Mode 2 knowledge production. Gibbons et al. (1994) articulated that Mode 2 allows new knowledge production as a socially distributed system-based process and they highlighted five characteristics which are applicable to academic-led structured interventions. First, Mode 2 knowledge is generated through action and there is no division between the production of knowledge and its application. Second, Mode 2 knowledge is transdisciplinary and therefore it mobilises a variety of theories, models, and practical methodologies to address an organisational problem (Gibbons et al., 1994). Third, Mode 2 knowledge is viewed as reflexive where the researcher shows a particular sensitivity to the process of research and the dynamics of CPS in organisations (Gibbons et al., 1994). Fourth, Mode 2 research is heterogeneous and works with organisational diversity, involving different organisations, participants, and researchers (Guerci et al., 2019). Mode 2 researchers are accountable to the organisations participating in the intervention and their academic communities. Finally, Mode 2 research utilises a diverse range of controls to facilitate the implementation of the academic-stakeholder collaboration.

Applying these characteristics to structured interventions, Thiele Schwarz et al. (2021) first highlight that these interventions are centrally concerned with changing the way things are done in organisations, and to be effective, they require collaboration between stakeholders and researchers. Kristensen (2005) highlights that they produce new practices, surface theories-in-use, and illuminate differences. In terms of the second characteristic, structured interventions have drawn on acquisitive theories of development (Garavan et al., 2015), experiential learning theories (Kolb, 1984; Kolb & Kolb, 2011), and theories of creativity, in particular creative behaviours including divergent thinking (originality, fluency, elaboration, flexibility) and convergent thinking (Berg, 2016). They also incorporate practical techniques such as brainstorming and working through the stages of CPS: idea collection, idea generation, idea consolidation, idea evaluation and choice, and idea elaboration (Birdi, 2016). Third, they are sufficiently flexible and dynamic to engage with the unique context of each organisation, and fourth, they engage with different types of creativity problems and participants. For example, in our study, we worked with hotels that had different business goals, target markets, and participants who had varying levels of work experience and experience of CPS. Finally, structured interventions allow for a range of controls including engagement with real-life creativity issues, the use of collaborative processes to address tensions and challenges, the use of reflection, and the generation of workable KSA outcomes for organisations (Franco et al., 2020). We were also conscious of the time that it takes for the outcomes of the interventions to generate creativity KSAs.

3 | CHARACTERISTICS OF THE COLLABORATORS AND METHODOLOGY

3.1 | The background and organisations

Prior to designing and implementing the structured intervention, the collaboration involved working with the largest creativity society (*APA Division 10: Society for the Psychology of Aesthetics, Creativity, and the Arts*) to inquire into the content and setup for creativity structured interventions. The process of engagement with the four organisations led to the identification of a specific organisational problem around the development of creativity KSAs. The structured intervention was implemented within four hotels located in Northern Ireland: one being part of a large multinational chain and three being part of local hotel groups. Operating in an extremely volatile economy which frequently reports high turnover rates and skills shortages across firms and countries (Baum, 2019), hospitality businesses are often considered to be somewhat a laggard when it comes to innovative approaches (Martin-Rios & Ciobanu, 2019), and thus employee creativity presents an opportunity for industry innovation (Hon & Lui, 2016). The first organisation was part of a major international hotel chain that operated in a highly competitive market and presented both strategic and operational issues. The strategic issue concerned the need to develop greater competitiveness within their

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market segment and the operational issue focused on the need to solve everyday challenges effectively and to bring fresh thinking to increase customer follow from the non-residential market segment. The second organisation experienced several operational problems that needed CPS. They had a particular issue with the use of hotel vouchers by employees and the need to manage revenue more effectively. The third hotel experienced business issues around competing successfully in the hospitality segment in which they operated. They sought to capitalise on trends in the hospitality marketplace including the flow of tourists from the Chinese market and the requirement to offer new services to existing market segments. The fourth organisation also experienced competitive issues and needed to diversify existing offerings and develop new campaigns. They also experienced operational problems around interacting with customers and ensuring high rates of customer retention.

3.2 | Design of the intervention process

In line with the procedure of creative interventions in organisations (Brem, 2019), the first stage of the intervention focused on personal and professional entry to each organisation. This stage centred on utilising the HR and general managers in identifying the relevant organisational problems that the intervention would solve. The collaboration involved a series of meetings with each hotel to discuss the relevance and value of creativity and their commitment to participate in the structured intervention. Together, they were planning the content and procedure of structured interventions, identifying those who would participate and discussing expected outcomes. This involved explaining proposed intervention layout and creative techniques to be used to stimulate creative thinking. Several minor recommendations were made by organisations and considered by the researcher in the intervention procedure, namely the use of technological equipment, physical space, and event time arrangements. Consistent with Gill's (2018) recommendations, we reinforced the role of employee creativity within the workplace and the competitive advantage to be gained through employee involvement in creative training.

The second stage involved the administration of several diagnostic tools to access the creativity environment within each hotel and creativity related characteristics of employees participating in the intervention. The third stage involved the delivery of the workshop component of the intervention where participants worked through the CPS process to address their unique creativity problem. The fourth stage of the process involved the collection of post-workshop data on both individual and organisational characteristics. The fifth stage of the process involved periods of engagement with the four organisations to collect data on how they experienced the creativity training, the experiential learning process that they engaged in, the way in which they solved creativity problems, and the outcomes they achieved. A summary of the core stages of the structured intervention is presented in Figure 1.

3.3 | Data collection

We made use of multiple types of data collection which enabled the accumulation of varied and rich sources of information from the 50 participants within the four organisations. The study participants consisted of 47 front-line managers who worked in key divisions such as sales, marketing, rooms division, and food and beverages plus three gatekeepers (HR and general managers) who did not participate in the workshop component of the structured intervention. We included the latter to ensure that we had source triangulation which is important in HRM research (Christensen et al., 2019). In the sample, 60% of participants were female; 51% were aged between 21 and 30; 38% had more than six years of experience; and all participants had not previously participated in creativity training.

We generated primary data using structured pre- and post-workshop surveys, structured observations during the workshop (DeWalt & DeWalt, 2011), and post-workshop semi-structured interviews (Burgoyne & James, 2006). The surveys enabled us to collect quantitative data on individual characteristics. We collected data on (a) openness to experience, (b) conscientiousness, (c) extraversion, and (d) neuroticism (Barrick & Mount, 1991; Costa &

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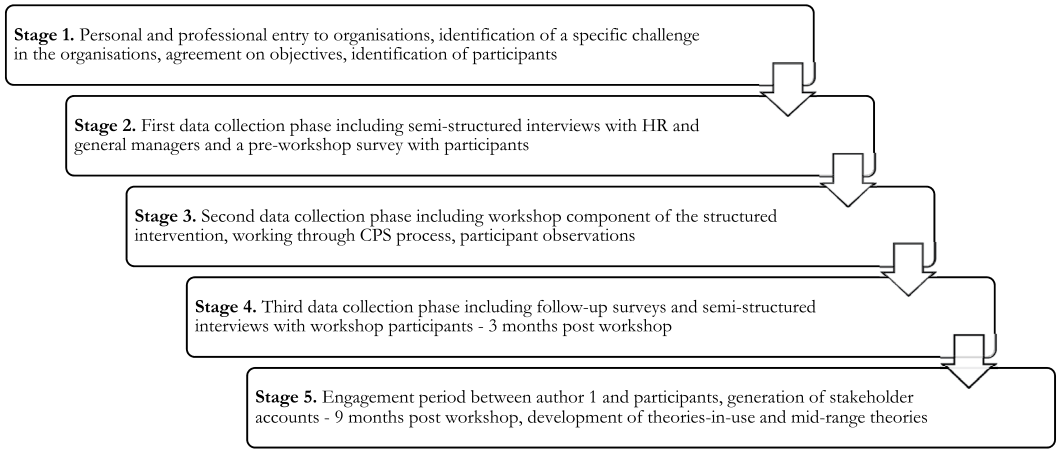

FIGURE 1 Core stages of the structured intervention

McCrae, 1992; Shalley et al., 2004), (e) creative self-efficacy, and (f) creative process engagement (Tierney & Farmer, 2002; Zhang & Bartol, 2010). We also collected data on four dimensions of the work environment (Amabile et al., 1996; Dul et al., 2011): (a) organisational encouragement for creativity, (b) managerial encouragement for creativity, (c) challenging work, and (d) work group supports. During the observation process, we collected qualitative data on creative thinking and creative behaviours, engagement with the artefacts, and communication and interaction among and with team members. The 23 semi-structured interviews were used to collect qualitative data on developmental processes around creativity, experiential learning processes, and KSA outcomes.

3.4 | Data processing and analysis

To analyse the data collected, we relied on an abductive approach that 'gives primacy to the empirical world' (Nenonen et al., 2017: 1132). During the conduct of the study, numerous anomalies in the data set were apparent. The implication of this for our analysis required the use of abduction defined as a 'cyclical process of identifying and confirming anomalies and generating and evaluating hunches' (Sætre & Van de Ven, 2021: 686). The process of data analysis consisted of four discernible stages that largely reflect the stages proposed by Sætre and Van de Ven (2021).

3.4.1 | Observation of anomalies

This stage involved first a careful reading of the transcripts and the development of four case histories. These helped us to understand the key phases of the experiential learning process and the role of the structured intervention in activating that process (Markowska & Wiklund, 2020). We then engaged in a process of thematic analysis involving continuous iteration between experiential learning theory and data which allowed us to identify inconsistencies or anomalies in the form of unexpected findings that were not in line with current understanding or theories. As opposed to the literature on experiential learning theory (Corbett, 2005; Kolb & Kolb, 2011), our data revealed the important role of team-based experiential learning processes. Moreover, our data revealed that the experiential learning process activated by the structured intervention was messy, unstructured, and at times iterative and regressive. These findings encouraged us to give more prominence to the occurrence of team-based creativity KSA outcomes derived from a structured intervention that was individual focused in terms of its content.

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3.4.2 | Confirming the existence of anomalies

The second stage of the data analysis process focused on the confirmation of anomalies. This process involved us going back and forth between the theory and data and a process of reiteration (Locke et al., 2022). Sætre and Van de Ven (2021) were particularly helpful in this context, and we used their *who*, *what*, *where*, *when*, and *how* type questions. To confirm these anomalies, we further grounded the unexpected insights developed within our data set, using both the context of the study and literature on experiential learning. We explored in more detail the experiential learning processes experienced within the four organisations and identified how they were similar or different.

3.4.3 | Developing hunches about the findings

We drew on relevant literature within the learning and development and experiential learning fields (Kolb, 1984) to develop further insights into the key phases of the experiential leaning process, the types of activities that learners utilised during each phase, the role of key antecedents that might explain the process, and a categorisation of KSA outcomes. We depicted this process in a diagram to identify the distinct phases (see Figure 2).

3.4.4 | Finding explanations for the hunches

The final stage of the data analysis process involved finding explanations for the phases of the experiential learning processes that we identified. During this stage of the analysis, we used abductive reasoning to link these findings

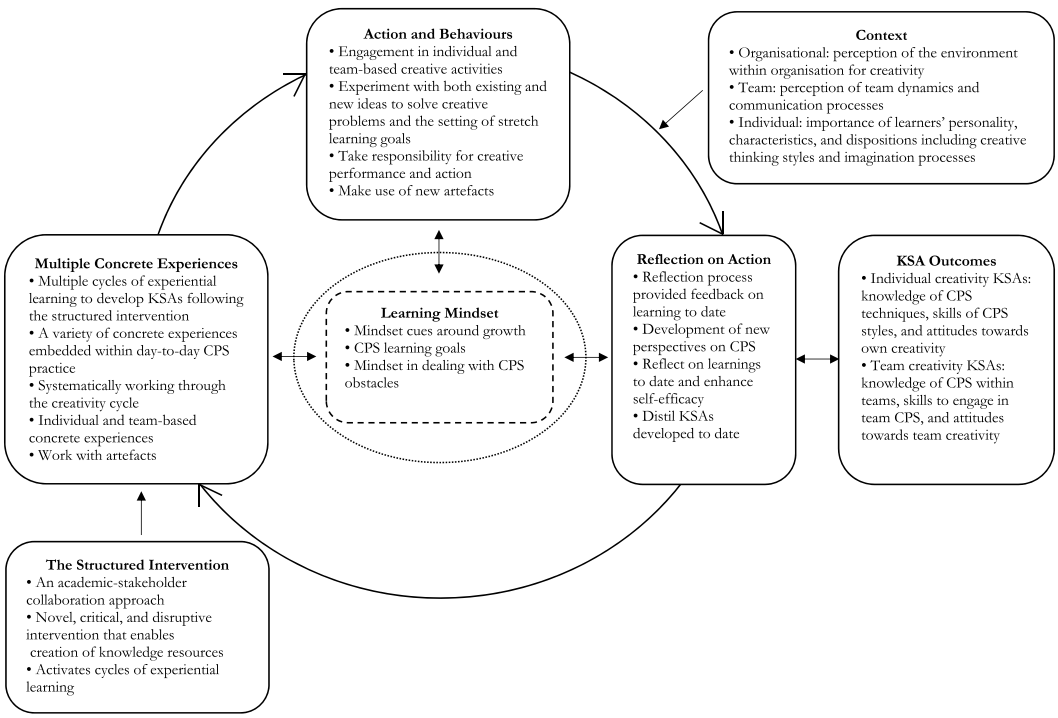

FIGURE 2 Intervention-activated creative problem-solving experiential learning process: Theory generated from theories-in-use

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to theoretical concepts and research findings. We continually moved between the data and the relevant literature in experiential learning and creativity development acknowledging both its strengths and limitations. Our process of iteration led us to the important concept of learning mindset (Heslin & Keating, 2017) to explain the key underlying individual characteristic that helped the continued activation of the experiential learning process initially prompted by the structured intervention. We grounded this concept in and refined the phases of our experiential learning process.

We took steps to enhance the methodological trustworthiness of the data we collected. We made use of creativity and experiential learning theory to develop out interview themes; we utilised data triangulation through structured observation to ensure that we had holistically captured the phenomenon under investigation; and we paid careful attention to data collection survey and case study protocols. In addition, we documented our methodological approach in terms of being rigorous, reflective, and relevant (Coghlan & Shani, 2014). Specifically, we adopted the framework proposed by Pasmore et al. (2008) which is summarised in Table 1. To develop this paper, Author 1 brought her experience of working with the creativity literature and her experience of working with the four organisations. Author 2 brought his experience as a researcher in the HRM field and his knowledge of academic-stakeholder collaborations. Author 3 brought his extensive experience as an academic in HRM and HR development and of working collaboratively with organisations. Both Authors 2 and 3 played an important role in challenging Author 1 on her analysis and they particularly helped her to detach from her primary knowledge domain—creativity. They also complemented her existing knowledge and, to use the words of Van de Ven and Johnson (2006: 807), to 'relinquish [her] personal standpoint'. We implemented this process to bring to the data analysis a form of triangulation and objectivity.

4 | RESULTS

4.1 | Organising the structured intervention

The first substantive stage of the structured intervention involved the negotiation of conditions around its implementation. The aim of this stage was to ensure clarity concerning the type of outcomes that would be developed. During this stage, the focus was on agreeing on the nature and extent of the collaboration, clarity around the purpose of the structured intervention, the problems to be addressed, the requirements around data collection, planning and timing considerations, and issues around confidentiality. Given these constraints, the process then moved on to agreeing on two areas of focus: (1) to unpack KSA development through structured interventions, and (2) to understand the micro processes that are inherent in academic-stakeholder collaborations.

Following agreement on these focus areas, negotiation took place with the HR and general managers in the four organisations. This involved agreement around the design and delivery of the intervention, its key stages, agreement on the specific methods of data collection, and the analysis of the data. Each organisation took responsibility for the identification of the employees who would participate in the intervention and the logistical arrangements for the workshop component of the structured intervention.

4.2 | Getting the lie of the land

This stage involved gathering data prior to the workshop component of the intervention. This included surveys and interviews to identify characteristics of individuals and the organisations in terms of the environment for creativity. This helped to understand the context in which the intervention was undertaken and it revealed that the participants had a number of desirable creativity characteristics which pointed to a potential success of the academic-stakeholder

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TABLE 1 Ensuring quality in the research process

The essence	Rigour	Reflective	Relevant
Purpose and rationale for action and inquiry • Case for action and research • Intended contribution	• Rationale for action is provided by stakeholders: The development of creativity KSAs	• Rationale is linked to past research and literature on Mode 2, events system theory, interventions, experiential learning, and individual creativity	• Stakeholders referred to limited training opportunities to enhance creativity for their staff
	• Rationale is underpinned by the scarcity of evidence on academic-stakeholder collaboration in the context of creativity development and HRM	• Rationale for structured intervention is supported by organisational issues, namely the need to accelerate creativity, business innovation, and performance	• Stakeholders required immediate structured interventions and actions to resolve strategic and operational issues around customer sevice
Context	• This research is undertaken in the context of four hotel organisations	• The research builds on past and current research on Mode 2 collaboration, creativity, experiential learning, and interventions	• The integration of Mode 2 research, structured intervention, event system theory, experiential learning, and creativity provides a unique analytical framework and theoretical and practical contributions
	• The research involves stakeholder reflection on the context and the competitive environment of the organsiation	• The research incorporates concepts from the event system theory perspective and characteristics of novelty, criticality, and disruption of such events to facilitate learning and creativity KSAs	
	• The research involves academic engagement, including review and synthesis of the relevant literature on hotel organisations		
Methodology and method of inquiry • The role of the action researcher • Ethical issues • Learning mechanisms	• This research incorporates the methods typically used as part of academic- stakeholder collaborations	• The methdology as well as the action and research cycles are described in the methodology section of the paper and illustrated in Figures 1–3	• In advance of the structured intervention, the stakeholders and the first author agreed on the extent of engagement and the method of action to be used
	• The research involves collaboration between stakeholders and the first author in the selection of methods of action and throughout the entire research process	• In advance of the structured intervention, stakeholders were provided with information about the research process and a consent form (see methodological notes)	• The stakeholders provided a problem specific to their organisation to be addressed during the structured intervetion
	• The method of action is informed by the CPS process	• Consent forms were signed by stakeholders who were the study participants (see methodological notes)	• The structured intervention followed the requirements of Mode 2 knowledge production

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TABLE 1 (Continued)

The essence	Rigour	Reflective	Relevant
Design	• Data were collected and analysed using the abductive research approach	• This research was designed and implemented in collaboration between stakeholders and the first author	• The first author clarified and explained the research questions them to each organisation
	• The research design was informed by multiple methods of data collection during the structured intervention including structured pre- and post-workshop surveys, structured observations during the workshop, and post-workshop semi-structured interviews	• The first author took on the key role of an academic facilitator	• Stakeholders within the four organisations identified study participants to participate in the workshop component of the structured intervention
	• Data were generated, collected, and explored in collaboration between stakeholders and the first author	• In advance of the intervention, the first author negotiated conditions with each organisation	• Inclusion criteria were requested by the first author: Interest in creativity by study participants, middle- and senior management hierarchy, involvement in key organisational functions
	• Data were further explored in collaboration between the three co-authors	• Confidentiality and anonymity of data was ensured by the first author • Study participants had an option to opt out from this research at any stage • Over the duration of this research, the first author maintained the relationship with stakeholders via correspondence and visits	• The first author clarified the roles of stakeholders and study participants as well as issues around their involvement in the structured intervention

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TABLE 1 (Continued)

The essence	Rigour	Reflective	Relevant
Narrative and outcomes	• The three authors used the abductive approach to data analysis: Empirical data in combination with existing theory to develop and refine existing concepts and develop new theory	• The story being told is interpreted in collaboration with stakeholders and study participants who helped the researchers to clarify their meaning and intentions	• Learning mindset emerged as playing a central role in sustaining the experiential learning process that led to the development of creativity KSAs
	• Cycles of action and reflection were presented in a systematic way	• The story being told is interpreted in collaboration with stakeholders and study participants who helped the researchers to clarify their meaning and intentions	• Learning mindset influenced interest and motivation of participants to engage in multiple learning cycles
	• The story was told in a neutral and factual manner and narratives were separated from interpretations	• The post-workshop survey and post-workshop semi-structured intereviews with stakeholders and study participants facilitated their voices and perspectives	• Learning mindset influenced interest and motivation of participants to engage in multiple learning cycles
	• The story was told using insights from the creativity literature (Author 1), the experiential learnig literature, and lirerature on academic-stakeholder collaborations (Authors 2 and 3)	• The story was further interpreted using methods of data triangulation and collaboration between the three co-authors	• Completion of the structured intervention led to both individual and team creativity KSAs • Experiential learning can be conceptualised as a team learning process in addition to an individual learning process • Completion of the academic-led structured intervention gives rise to both theories-in-use and academic theories
Reflection on the story and outcomes	• Findings of study participants are reported using the abductive research approach	• Nine months following completion of the structured intervention, the first author spoke with study participants and discussed possible actions around creativity and development	• The participating organisations acknowledged a difference in creativity of employees

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TABLE 1 (Continued)

The essence	Rigour	Reflective	Relevant
	• Feelings are reported in the language and manner that is relevant to both academics and stakeholders	• The study's co-authors completed rounds of paper iterations to ensure a shared meaning of the story	• The participating organisations acknowledged that completion of the structured intervention contributed to their needs addressing operational and strategic issues around creativity
	• Perceptions address the components of the intervention including the context, learning mindset, multiple concrete experiences, action and behaviours, reflection on action, and creativity KSAs		• Findings highlight the value of collaboration between stakeholders and academics in the context of creativity development • Findings generated new theoretical insights on the development of creativity KSAs in organisations via the experiential learning process
Discussion	• Academic-stakeholder collaborations are effective in research projects that seek to achieve both theory and practice contributions	• Academic- stakeholder collaboration requires a close partnership with stakeholders across the full collaboration process	• KSA outcomes: The results of academic-stakeholder collaboration can lead to a permanent change in KSAs such as individual and team creativity KSAs
	• Such collaborations can bridge scholarly-based knowledge with practice, whilst at the same time addressing organisational issues	• Dialogue and trust are imperative to academic-stakeholder collaboration and lead to more open and complete stories and perspectives	
	• The results of these collaborations help surface stakeholders' theories-in-use and strategies (such as those around CPS) ready to be applied in day-to-day work	• It is imperative to build a common knowledge and understanding with stakeholders when working in an academic-stakeholder collaboration	
	• The results of collaboration help the emergence of theories and knowledge that can be replicated in other settings and contexts		

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collaboration. For example, individuals were effective on desirable creativity personality traits such as conscientiousness, extraversion, and openness to experience.

The data revealed mixed findings when it came to the environment for creativity including culture of creativity, freedom to carry out projects, and managerial encouragement for creativity. The data also revealed important impediments to creativity including the lack of recognition that creativity was important, resistance to new ideas, the lack of rewards for creativity, and fear amongst managers to take risks. These impediments are consistent with Argyris (1970) and Schein (2008) who argued that impediments are located or grounded in stakeholders' theories-in-use. In addition, these theories-in-use may vary considerably from what is espoused by organisational decision makers. This data helped to shape expectations concerning the potential effectiveness of the structured intervention to enhance CPS and address important organisational challenges.

4.3 | Developing insights on the role of the workshop in activating experiential learning

This stage focused on the delivery of a series of structured classroom-based workshops with middle and senior management and HR staff within the four organisations. Several important insights emerged from the data collected through observation during the workshop including the importance of teamwork, the role of the facilitator in helping employees to generate ideas, the quick generation of ideas, the development of multiple ideas, the exploration of connections between ideas, the recording of ideas, the discussion of ideas with the academic, the solicitation of feedback on ideas, the selection of the best ideas, the presentation of ideas with other teams, and engagement in follow-up activities. These insights were generated utilising the observation protocol described in the methodological notes. The workshops were transformative in terms of activating an experiential learning process. The academic facilitator also played an important role in keeping employees focused on the creativity development tasks and working through the CPS process.

4.4 | Developing insights around the context, process, and outcomes of experiential learning

Having completed the workshop component of the structured intervention, the next stage focused on employees' use of CPS to address creativity problems within their respective organisations. Post-workshop survey and interview data allowed us to develop several important insights from this stage of the process. First, the learning mindset of employees emerged as central to their engagement in CPS and the development of their KSAs. Dimensions of the learning mindset that emerged as important included the belief by employees to develop CPS, openness to new learning situations, the opportunity to focus on learning, and the capacity to see the bigger picture. We found that employees were committed to using CPS techniques and taking responsibility for creative performance. Our data also revealed changes related to the individual and organisational contexts. At an individual level, we found an increase in achievement striving, excitement seeking around creativity, risk taking to solve creative problems, and assertiveness to address creativity problems. In terms of the organisational context, the data highlighted a decrease in the organisational impediments around CPS and some small changes in terms of resources for creativity.

Employees showed a strong commitment to using team CPS situations as opportunities to learn and to engage in dialogue with both self and others. The dimensions of action, in the context of the experiential learning process, included experimenting with CPS techniques, taking on a leadership role for a team, the use of team facilitation activities, and the implementation of brainstorming activities. Reflection emerged as a vital component of the experiential learning process. This included both self- and other-focused reflection. Dimensions of self-reflection included the use of artefacts at work to develop creativity KSAs, identification of what worked well and what did not, and reflection on the ideas created by others. Other-focused reflection activities included team reflection processes,

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ideas exchange and questioning of others, and gaining insights into how other employees and teams addressed CPS activities.

As the experiential learning process evolved, we found several important KSAs in the context of CPS, emerging in an incremental and additive way. Knowledge outcomes included awareness of different styles of CPS, knowledge of CPS techniques, and increased understanding of the key stages of the CPS process. Key skill outcomes included the application of CPS techniques and the skills to engage in team CPS. Important attitude outcomes that emerged included increased openness to CPS situations, belief in capabilities to address CPS situations, and the importance of proactivity.

Table 2 summarises some of the high-level findings from the study and Figure 2 presents our conceptualisation of the CPS experiential learning process, and we also report here some other important findings to emerge from the academic-stakeholder collaboration. In terms of the generation of theoretical insights about the process of developing creativity KSAs, we found that it is an iterative and recursive process that involves both individual and team-based experiential learning processes (Figure 2). This process leads to important learning outcomes that focus on learning about creativity, learning to do CPS, learning to become confident in CPS, and learning to engage in CPS with others. The centrality of stakeholders' theories-in-use emerged as important to the learning process. When it came to insights about the academic-stakeholder collaboration (Figure 3), our finding reveal tensions concerning the time scales involved, the potential to agree on a practice problem that met the requirements of both stakeholders and academics, and the role of time in building a relationship and a sense of identity.

5 | DEVELOPING THEORIES-IN-USE ABOUT CREATIVE PROBLEM-SOLVING

We define theories-in-use as those that can be inferred from action (Argyris et al., 1985). According to Argyris and Schön (1978), this includes the mental maps that employees have about their actions in the context of creativity. These mental maps are instrumental in guiding the creativity actions of employees. Employees within the four organisations began to use artefacts and techniques to engage in CPS. We describe some of these components in the methodological notes. The use of CPS artefacts began to evolve over time reflecting employees' increased confidence and improvements within each organisation in terms of climate for CPS. Before the intervention, these organisations did not practice CPS in a structured way and had few insights concerning the artefacts that they could use in this context. Employees provided descriptions of elements of practice including drawing mini circles of opportunities in their diaries, selecting ideas from the circle, and exploring connections between them. The use of diaries assumed greater importance and centrality to the CPS process as did the use of flipcharts and team brainstorming. Interactions during the collaboration reinforced understanding of these techniques and artefacts and participants were able to point to successes from using these approaches. The learnings from the workshop component of the structured intervention directly informed participants' approaches to CPS and provided them with the confidence and motivation to interpret what they were doing. The participating organisations gained insights into how the CPS process can be systemically linked to day-to-day work routines and activities.

6 | BUILDING THEORY ABOUT CREATIVITY DEVELOPMENT FROM THEORIES-IN-USE

In parallel with stakeholders' theories-in-use, we capitalised on various knowledge resources developed through links with the four organisations. The analyses of data collected throughout the structured intervention helped the development of insights about the role of experiential learning processes and the centrality of learning mindset in the context of CPS and creativity development. As the collaboration evolved, there was more engagement with theoretical insights around experiential learning theory and the contribution of HR practices to creativity development in organisations. Together, they combined complementary perspectives leading to engagement with research domains

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TABLE 2 Key findings emerging from the study

Dimensions	Findings	Illustrative examples
Context	Organisational context: Less positive perceptions of support for creativity, including lower organisational encouragements to participate in creative work; limited managerial encouragement to take risks and develop creativity; some access to materials/equipment for creative work	*We have a communication problem… If someone at the top comes up with a new idea, it is not always filtered down correctly; the same as the other way… this does not encourage people to want to be more creative* (Trainee Manager, HoCo2)
	Team context: Evidence of moderate work group supports when it comes to creativity, including willingness to help each other and willingness to work together on complex problems	*We do not have a strong team culture when it comes to complex problem-solving* (Operations Manager, HoCo3)
	Individual context: Less favourable attitudes towards own creativity, including openness to new ideas/training; however, a strong preference to work with others on complex tasks, and creative self-efficacy	*Being creative would not be one of my strongest attributes* (Digital Marketing Manager, HoCo4)
Learning mindset	Mindset cues around growth: Strong beliefs concerning the importance of creativity in own job; openness to participate in new learning experiences around creativity; positive attitudes to the structured intervention as a valuable development opportunity	*Creativity is important in my profession, but I do not think that I am creative, I do not like being creative; I want to change this* (Training Manager, HoCo2)
	CPS learning goals: Strong commitment to learn about how to be more skilled in the area of creativity; strong interest to learn about how to approach difficult and unfamiliar problems	*I often find it challenging to think creatively and my go to response is to rely on previous experience; I want to learn how I can get more creative in my job role* (Duty Manager, HoCo1)
	Mindset in dealing with CPS obstacles: Evidence of willingness to take responsibility for own creative behaviours and performance; strong commitment to continual learning about creativity	*I know that I have to work beyond my normal work understanding and learn a lot to fully embrace creativity* (Operations Manager, HoCo4)
Multiple concrete experiences	Multiple cycles of experiential learning: Completion of CPS stages during the structured intervention; evidence of commitment to resolve problems creatively; willingness to apply CPS to own problems at work	*Participants complete stages of creative problem-solving; they come up with a variety of different and novel ideas to their problem* (extract from participant observations)
	Individual and team-based concrete experiences: Evidence of creativity-related cognitive processes and behaviours including divergent (novelty, a variety of ideas, fluency) and convergent thinking	*Inspires less engaged team members to work together on CPS and involves these peoplee in discussion by asking: 'what do you think? Does it make sense?'* (Food and Beverage Manager, HoCo2)
	Work with artefacts: Evidence of effective application of the artefacts to own work; evidence of reflection on the role of artefacts for CPS	*I liked to work with the artefacts, for me it was a sort of a game, and everyone including myself wanted to play it* (Operations Manager, HoCo3)

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TABLE 2 (Continued)

Dimensions	Findings	Illustrative examples
	Concrete experiences embedded within day-to-day CPS practice: Evidence of completion of CPS; development of own ideas; exchange of ideas; evidence of the development of final solutions with others	*It takes less than 5 minutes for some participants to generate ideas and complete stages of CPS; the participant asks, 'what should we do next?'* (Duty Manager, HoCo1)
	Working through the creativity cycle: Evidence of interest; practice CPS to own work; evidence of developing CPS instructions in own time	*I revise the CPS techniques that we did during the workshop… I am planning to do similar workshop with my own team* (Events Coordinator, HoCo2)
Action and behaviours	Engage in individual and team-based creative activities: Evidence of embedding CPS techniques in daily work; spreading the word about creativity and encouragement of own team to learn about creativity	*I developed an idea with my team; I trained my team in creativity and explored that idea together with them* (Marketing Manager, HoCo3)
	Experiment with new approaches and set stretch learning goals: Evidence of commitment to team-based CPS as an opportunity to learn more about creativity; use of team facilitation activities such as team training in creativity; getting feedback on own creativity	*Everyone in the hotel seems to have tried to use what we learnt in the workshop to change how we think about problems; I tried to use outside-the-box thinking to explore potential solutions to the work engagement problem* (Duty Manager, HoCo1)
	Take responsibility for creative performance in action: Evidence of delivery of team CPS sessions at work; taking initiative to explore problems with own team; encouragement of own team to practice CPS; exchanging ideas; participation in idea evaluation activities	*I have a range of problems at work… now I am trying to take responsibility and identify a creative way of dealing with those problems with my team or figure out a way to approach things* (Reservations Manager, HoCo1)
	Make use of new artefacts: Evidence of the use of brainstorming exercises with own team; use of a range of CPS artefacts in own work to facilitate CPS	*I organise group meetings with the team and we all brainstorm creative ideas; I use the same artefacts when I have a discussion with the staff* (Assistant General Manager, HoCo2)
Reflection on action	Process provided feedback on learning to date: evidence of recognition for creative work by a professional body; gaining trust from line manager and support from own team and others	*This hotel nominated me for the Hotel Hero Award through the Northern Ireland Hotels Federation and part of the reason was the creative approach that I took to increase health and wellbeing for staff* (HR Manager, HoCo1)
	Develop new perspectives on CPS: Evidence of the use of diaries to practice creativity; involvement in learning from colleagues who achieved success in CPS; getting inspired by colleagues' experiences	*I use my own diary to practice the CPS technique in my work; this is kind of a mind map helping me identify more than one solution and see which one works better* (Digital Marketing, HoCo4)

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TABLE 2 (Continued)

Dimensions	Findings	Illustrative examples
	Reflect on learning to date: evidence of evaluation of own learning experiences in terms of what worked well and what did not; development of confidence in the use of CPS in a work setting	*After the workshop, I understood that it is not just me who has all ideas; it is using other people's ideas as well to develop mine and also come up with better solutions* (Trainee Manager, HoCo2)
	Distil KSAs developed to date: evidence of positive feelings (confidence/motivation) to participate in creative work and interpret outcomes; exploration of remedial actions to support KSA development	*I got some confidence in my creativity but more learning is needed; there should be more opportunities to learn about how to work as a team, how to solve problems together* (Accountant Manager, HoCo1)
KSA outcomes	Individual outcomes: Evidence of new knowledge of CPS techniques and key stages; new skills to employ CPS in own work and work with others; new attitudes to own creativity	*The workshop changed my knowledge about creativity and way of thinking and how I could develop in becoming more creative to benefit not only the business but my team as well* (Marketing Manager, HoCo4)
	Team outcomes: Evidence of new knowledge of how to apply CPS techniques with teams; new skills to engage in team CPS; new attitudes to team CPS and own role in team creativity	*The workshop helped to develop my ability as a team leader, so that I can train my team in creativity and work together on business and departmental problems* (Events Coordinator, HoCo2)

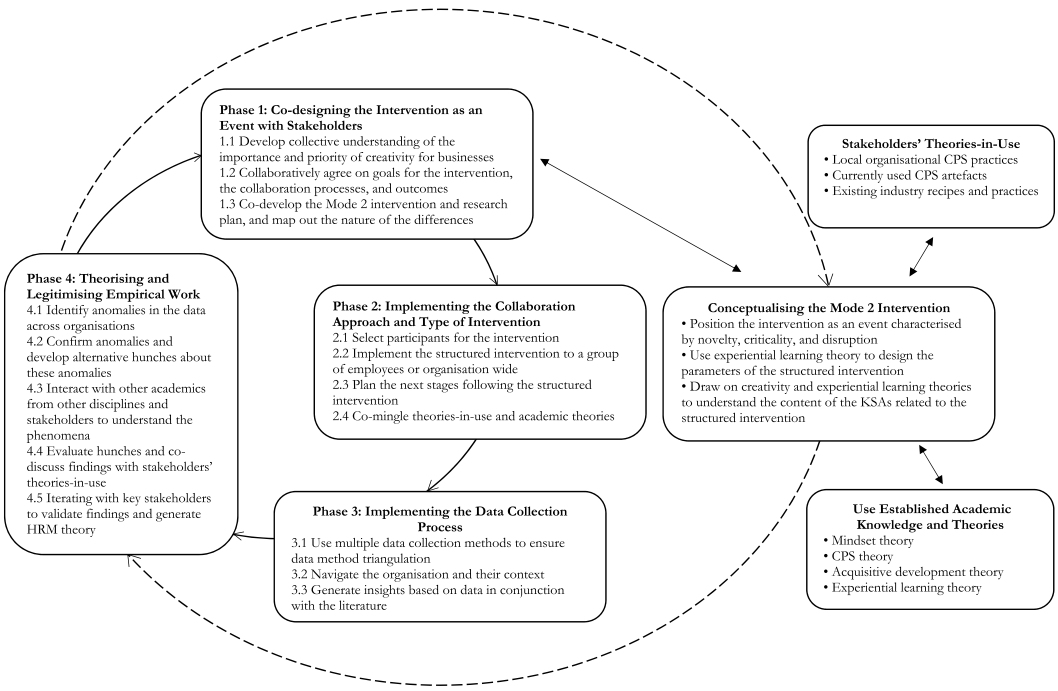

FIGURE 3 Academic-stakeholder collaboration process for Mode 2 knowledge production

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such as acquisitive development (Garavan et al., 2015), self-directed learning (Merriam, 2018), self-regulated learning (Sitzmann & Ely, 2011), mindsets (Dweck, 2017), learning mindsets (Heslin et al., 2020), and experiential leadership development (Ashford & DeRue, 2012). Following further refinement of the data analysis, including the development of second order codes and aggregated dimensions, allowed the exploitation of the data for academic purposes. This led to the production of what Nenonen et al. (2017) call context-specific academic knowledge which is considered essential to Mode 2 theorisation. Specifically, we developed HRM theory to explain the phenomenon under investigation. This HRM theory was derived through the integration of theory with empirical research (Merton, 1968). We started with an empirical phenomenon as opposed to a broad abstract idea which is the focus in grand theorising. Figure 3 presents our conceptualisation of the academic-stakeholder collaboration process.

7 | DISCUSSION

In this section, we highlight our contributions and impact of the academic-stakeholder collaboration. We make three important contributions to the literature around (1) the development of theoretical insights concerning the process of experiential learning that underpins the development of creativity KSAs, (2) the dynamic micro processes of the academic-stakeholder collaboration, and (3) the role of theories-in-use in generating theory within HRM.

Our first contribution stems from the generation of theoretical insights about experiential learning process that is activated through the workshop component of the structured intervention, sustained through the operation of the learning mindset of employees during day-to-day work activities, and reflected in stakeholders' theories-in-use. We theorised a structured intervention as a workplace event that had novelty, criticality, and disruption, and thus activated employees to engage in the development of their creativity KSAs (Morgeson et al., 2015). The key components of the experiential learning process model are depicted in Figure 2. Starting at the bottom-left side of the model, we give focal attention to the *structured intervention* which provides the arena for the collaboration of both academics and stakeholders. The intervention enabled both parties to delimit their roles and manage the evolving relationship (Coughlan et al., 2021). In terms of an academic-stakeholder collaboration, it aligns with the recommendations put forward by Van de Ven and Johnson (2006) in that it addressed a real-world problem but also allowed for framing of two research questions that address shortcomings in the literature. The intervention additionally set boundaries around the role of both parties and the resources they could contribute, and it allowed a process to evolve that resulted in the development of data and theoretical insights (Crespin-Mazet et al., 2017).

We now move to the *context* component which we depict at the top-right side of the model. We conceptualise context in terms of organisational (Amabile & Pratt, 2016), team, and individual (Anderson et al., 2014) dimensions. At an organisational level, we refer to perceptions of the work environment (Amabile et al., 1996; Dul et al., 2011); at a team level, we considered perceptions of team dynamics and communication processes; at an individual level, we included aspects such as creative thinking styles and imagination processes (Tierney & Farmer, 2002; Zhang & Bartol, 2010). These characteristics are represented as proximal contextual conditions that impact the experiential learning process of employees as they develop their creativity KSAs.

Central to our model and sustainment of experiential learning is *learning mindset* (Heslin & Keating, 2017: 370) which is conceptualised as 'a mental framework that guides how people think, feel and act in challenging achievement situations'. This conceptualisation also points to the potential of employees to develop creativity KSAs. The development of these KSAs is a complex task that requires employees to set challenging learning goals (Burnette et al., 2013), to identify learning strategies to achieve these goals, and to show persistence until these goals are achieved (Blackwell et al., 2007). We propose that a strong learning mindset helps employees to navigate the experiential learning journey involved in developing creativity KSAs. It also shapes the ways in which they engage with this learning process.

We now turn to the key components of the experiential learning cycle and illuminate how this cycle emerged in the context of the development of creativity KSAs. We first propose that employees will, consistent with an acquisitive

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development concept, work through *multiple concrete experiences* (Kolb & Kolb, 2011). These concrete experiences are embedded within day-to-day CPS practice, provide employees with the opportunity to work through the creative cycle, consist of both individual and team-based elements, and involve the use of various creativity artefacts, or, what we conceptualise as their theories-in-use. Individuals can react to identified creativity problems in two ways: taking a narrow focus and using existing solutions or taking a broader focus and generating novel ideas. This occurs as individuals gain confidence through successive cycles of experiential learning. The strength of individuals' learning mindsets will prompt them to engage with a greater range of concrete experiences and a broader range of artefacts to develop their creativity KSAs (Cury et al., 2008).

The next phase of the experiential learning process focuses on *actions and behaviours*. Here, a strong learning mindset helps employees to engage in experimentation that is conducive to the development of creativity. It will also help them to set stretch learning goals which contribute to the development of specific KSAs. Learner experimentation is also co-active to opportunities to receive feedback, which is considered imperative for creativity, learning, enhanced effectiveness in CPS, and KSA development (De Stobbeleir et al., 2011). During this phase, individuals with a learning mindset will seek out more information from feedback and view it in a positive way. They are also more likely to seek feedback when they are faced with difficult and challenging CPS situations (Heslin & VandeWalle, 2005). We also envisage that employees with a learning mindset will make greater use of creativity artefacts and experiment more with their use and effectiveness.

The next phase of our model envisages that the process of action and behaviours leads to *reflection on action*. This involves looking at what happened in specific problem situations, making sense of what happened, abstracting what can be learnt from experience, and exploring what remedial action can further enhance KSA development. This process is also infused with employees' learning mindset, arguing that where it is strong, they are more likely to engage with reflection on action processes. Employees are also likely to explore alternative approaches and learn from colleagues who have achieved success in CPS (Nussbaum & Dweck, 2008). We found that an important component of reflection in action in the context of creativity concerned the distillation of learning from experience and what might be done differently to achieve more effective KSA development.

The final component of our model focuses on *KSA outcomes*. We envisage a bi-directional relationship between KSA outcomes and the reflection on action component of the experiential learning process. Our data points to both the impact of reflection on action in leading to KSA outcomes and the influence of these KSA outcomes on future cycles of experiential learning (Garavan et al., 2015). We conceptualise knowledge outcomes in terms of awareness, belief in understanding of CPS, and understanding the value of the structured intervention. Skill outcomes refer to the application of CPS techniques in own work, taking initiative to solve problems, and improving business performance. Finally, attitude outcomes consider employees' feelings and self-belief towards creativity, and openness to creativity development. These KSA outcomes feed into a virtuous cycle of continuous refinement as employees work through multiple cycles of experiential learning (Kolb & Kolb, 2011). Ultimately, the range of individual and team-based creativity KSA outcomes achieved by participants demonstrates the broader impact of our collaboration (Wickert et al., 2021), beyond elite-focused approaches (Bresnen & Burrell, 2013).

Through the illumination of this process, several important insights emerge concerning the nature of the experiential learning process. In the context of the development of creativity KSAs, we highlight the central role of a learning mindset within the experiential learning process in that it infuses all stages of the process. In contrast to employees with a fixed mindset, individuals with a learning mindset demonstrate a desire to learn and persevere despite potential obstacles. Our experiential learning process which encompasses concrete experiences, action and behaviours, and reflection on action highlights that it can be conceptualised as a team process which contrasts with the extant literature (Becker & Bish, 2017) which emphasises experiential learning as a solo process. We also reveal the important role of artefacts for creativity KSA development which give effect to stakeholders' theories-in-use and are fundamental to the experiential learning process. In addition, we highlight the importance of a contextualised model of experiential learning when it comes to the development of KSA outcomes. KSA development as an experiential learning process begins with the perception of a situation by the learner who assesses the perceived complexity

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of the creativity task. This, in turn, impacts how the challenge is addressed and can include a narrower perspective where an employee using an existing approach to solve the creativity task; alternatively, the employee may take a broader approach that comes from experience and enhanced self-efficacy, resulting in new ideas and engagement in a continuous process of experiential learning. These insights represent important additions to our understanding of experiential learning theory in the context of a specific domain of KSA development—creativity.

Our second contribution focuses on unpacking the dynamic nature of academic-stakeholder collaborations in the context of a structured intervention. Figure 3 illustrates the key phases of this collaboration and in doing so depicts this process as somewhat linear and one characterised by little tension and paradox; however, in reality it was something more complex. We particularly note the following five complexities. First, we were able to develop insights about a practice problem that met the needs of the participating organisations and allowed the academics to develop insights concerning the nature of the gap and the manifest tensions inherent in it. We were therefore able to accommodate a variety of interests and priorities (Kelemen & Bansal, 2002). Second, what became particularly evident throughout the collaboration and the implementation of the structured intervention was the issue of time orientations (Bansal et al., 2012; Bartunek & Rynes, 2014). The four hotels were essentially looking for a quick and rapid response to a creativity problem whereas the researchers were more interested in having a longer period of observation, reflection, and synthesis to theorise the gap. Third, the collaboration process also revealed differences in terms of how problems were defined and addressed. The stakeholders, for example, took the messy reality of the problems in practice as taken for granted, whereas we researchers were more focused on neat and precise definitions of the research problems and the need to map out the research and intervention processes. Fourth, we also developed insights about the scope and length of an academic-stakeholder collaboration. Scholars such as Wenger (1998) highlighted the importance of developing a sense of shared identity that only comes through a long period of collaboration. The academic-stakeholder collaboration reported in this study was of limited duration (less than a year) and could be viewed as a data collection opportunity rather than something more profound (Van de Ven & Johnson, 2006). Fifth, our study reveals the importance of contextual expertise in developing HRM theory from academic-stakeholder collaborations (Gümüsay & Amis, 2020). The use of a structured intervention helped to generate in-depth insights into the settings in which managers engaged in CPS while also maintaining important critical distance from these settings. This contextual expertise related to the generation of a depth and breadth of understanding of the four empirical sites and the scope to engage, capture, comprehend, convey, and confirm the characteristics of the research settings.

Our third contribution concerns insights about the links between theories-in-use and the development of HRM theory that have potential application in multiple contexts. A theory-in-use approach capitalises on the mental models of stakeholders and builds them into theories that advance HRM practice (Argyris & Schön, 1978). We suggest that such an approach helps us to better communicate with stakeholders in a language they understand. Additionally, such an approach takes away the necessity to borrow theories form other disciplines and force-fit them to provide a foundation for our research, consequently losing touch with HRM practice. Other scholars have suggested that the process of borrowing frameworks and theories restricts researchers to what they already know, rather than coming up with something novel (Zeithaml et al., 2020). We acknowledge that in the context of generating new insights in this study we were shaped by the knowledge and experience of study participants. We do however suggest that structured interventions provide researchers with the potential to surface interesting and novel theories that can provide the basis to enhance HRM practice and scholarship. We also acknowledge that there will be debate concerning the type of theory that is generated. For example, Banks et al. (2021) characterises the theory developed as 'intermediate' in that it is based on direct evidence from multiple sources with the potential for alternate explanations. Others suggest that it is 'mid-range' theory, appropriate to a particular context rather than the development of a 'grand' theory (Nenonen et al., 2017). The argument goes that to produce grand theories, it is necessary to apply these mid-range theories in other contexts and scrutinise the results in the academic domain.

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8 | CONCLUSION

In this paper, we have reported on a structured intervention as a form of Mode 2 knowledge production with two purposes in mind; first, to gain insights on the role of structured interventions to develop theory about creativity KSAs; and second, to understand the micro processes involved in an academic-stakeholder collaboration. We conceptualised the structured intervention using an event system perspective which was driven by the organisations' needs to address a specific and relevant creativity problem. This allowed us to produce new theoretical insights on the development of creativity KSAs in organisations, illuminating the experiential learning process and providing insights on the micro processes involved in developing HRM theory. We therefore provide evidence that knowledge production and new theoretical HRM insights can be generated by stakeholders and academics in the context of application and practice in organisations.

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CONFLICT OF INTEREST

We do not have any competing interests to disclose.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are available on request. The data are not publicly available due to containing information that could compromise the privacy of research participants.

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SPECIAL ISSUE ARTICLE

"Important for you to be there": Employee activism and the dialectics of researcher–practitioner collaborations

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Abstract

The current study examines researcher–practitioner collaborations in the context of employee activism, a context in which the role of reflexivity and theorisation relate in unique ways. Specifically, we examine the collaboration between researchers and a practitioner sustainability manager, in the context of an ongoing organisational sustainability campaign at a French business school. Within the context of an ethnographic, participant observer study, we examine how the roles of "theory" and "practice" are distributed in dynamic ways, and how, across the study, roles are challenged and inverted, oscillating in dialectical moments which we term "praxis encounters". We contribute to growing debates around academic–practitioner collaborations by showing how the roles of researchers and practitioners evolve dialectically over the course of a project, how employee activism may be studied using collaborative approaches, and how human resource managers may support employee activism. We call for future research about the variety of such dynamics across diverse contexts.

Abbreviations: CSR, corporate social responsibility; HR, human resource; HRM, Human Resource Management; RSE, Responsabilité Sociale des Entreprises.

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KEYWORDS
business schools, employee engagement, organisational change, qualitative research methods, researcher–practitioner collaboration, role clarity, sustainability

Practitioner notes

What is currently known?

- Academic–practitioner research collaborations are increasingly important in business research.
- Employee activism settings provide unique contexts for collaborations.
- Theory–practice and insider–outsider roles may be mixed within activist contexts.

What this paper adds?

- Empirical description of a processual view of researcher–practitioner collaborations.
- Conceptual description of "praxis encounters" in which researcher and practitioner roles are negotiated.
- Process of reflexivity for practice and action for research are discussed.

The implications for practitioners

- Researcher and practitioner roles are not fixed along the span of a project, but are dynamic and evolving.
- It may be the case that researchers and practitioners switch roles, if only provisionally.
- Dialectic evolutions of researcher–practitioner relations characterise activist settings, but may have wider import.
- Dynamic views of collaborations may justify longer term, more immersive research collaborations.

1 | INTRODUCTION

Author 2: If you take me into the mix I'm gonna have a weird position, like… what do I get to say here… it's like a Russian doll of analytical levels…

Atalanta: Yeah, totally! So, how are you gonna write a paper about that? It would be a paper just defining the difficulty around defining what we mean.

Increasing scholarly attention has been given to employees' engagements with social activism from within their organisations (e.g., Briscoe & Gupta, 2016; Carollo & Guerci, 2018; Meyerson & Scully, 1995). Alternatively termed "employee activism" (Briscoe & Gupta, 2016) "tempered radicalism" (Meyerson, 2001; Meyerson & Scully, 1995) or "embedded activism" (Schifeling & Soderstrom, 2021), employees' social-change initiatives confront myriad obstacles within organisations, from resource limitations to political opposition. The challenges of employee activism can lead employees to adopt a double consciousness, alternatively described as wearing "two hats" (Briscoe & Gupta, 2016) and being "activists in a suit" (Carollo & Guerci, 2018); that is, organisational insiders looking beyond the organisation towards wider social purposes.

Employee activism is an important, if understudied, issue within human resources (HRs). As Briscoe and Gupta (2016) describe in their review of activism in organisations, HR managers' activities shape (promoting or deflecting) activist practices in organisations, and relations of hierarchy and internal organisation shape how activism unfolds (Morril et al., 2003). Schifeling and Soderstrom (2021) note how internal activists can be instrumental in mobilising organisational members vis-à-vis social challenges, and Carrington et al. (2019) note that the everyday activist practices of employees and managers are an underexplored source of social responsibility within

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organisations. Despite these promising avenues, Briscoe and Gupta's (2016, p. 46) review notes that research on internal activism is rare and emergent, posing significant opportunities to "better understand insider activists".

Specifically, promoting HRs scholarship around employee activism can benefit from methodological developments in scholar-practitioner collaborations (see Coghlan & Brannick, 2014, Chapter 3) where researchers "work closely with" engaged practitioners within organisations (Reedy & King, 2019, p. 564). Problematising the "inside-outside" boundary between researchers and practitioners, such developments have largely focused on researchers that occupy (or can attain) "insider" access (e.g., Brannick & Coghlan, 2007; Learmonth & Humphreys, 2012), bringing them closer to practitioners. More relevant to internal activism, however, some argue that the increased reflexivity of knowledge-worker populations and their exposure to academic theory has effectively turned practitioners into theorists of themselves, conferring an outsider status to the inside (Cassell et al., 2020; Islam, 2015). Despite this reconceptualised role of the practitioners' reflexivity, as Bartunek and Rynes (2014, p. 1194) note, "There has been very little empirical study of dialectics associated with academic–practitioner relationships".

Applied to employee activism, this methodological point takes particular nuances as researchers encounter practitioners who task themselves with shaping the organisation's social relevance or impact. "Co-operative" methodologies such as participative action research (e.g., Reason & Bradbury, 2001), where practitioners "participate actively […] throughout the research process" (Whyte, 1991, p. 20), complicate the lines between insider and outsider, as well as those between theory and practice. This potential blurring raises conceptual questions (around how to change an organisation from the "inside" or how internal actors can shape the "outside") and methodological questions (around the relation between theory and empirics). It has been discussed, for instance, in ethnographic embedding of researchers within reflexive (or "para-ethnographic") settings where participants reflexively theorise and critique their contexts (Hill et al., 2021; Islam, 2015). Such para-ethnographic settings involve moments in which practitioners engage in critical reflection on their practice, while researchers study the lived experience of on-the-ground struggles, giving rise to complex boundary negotiations and surprising role reversals. To begin to understand the challenges and opportunities of the overlapping and dialectical processes that mark such situations, we ask "how are knowledge and practice shaped by the dynamics of researcher–practitioner collaborations, in contexts of employee activism"?

To explore this question, we examine a case study of activism around environmental sustainability involving a sustainability manager within a private business school. The first author engaged in an ethnographic field study of the sustainability program, where the line between researcher and practitioner was constantly put into question by the researcher's support for the practitioner's activism and by the practitioner's academic knowledge and ongoing theorisation of the collaboration. In this context, a dialectic of theory and practice persistently punctuated the research–activism boundary, resulting in shifts to both the academic and practical projects of each actor. Drawing lessons from this case, we theorise how researcher–practitioner collaborations can go beyond simply "instrumentalising" research for practical impact, to rethink dominant concepts of both theory and practice.

The remainder of this paper will unfold as follows. First, after a brief review of research on employee activism and Human Resource Management (HRM), we explore some of the methodological dilemmas that result from collaboration with a problematised researcher–practitioner boundary. Next, exploring our case, we examine how these dilemmas were worked out in practice, and to what effects for the organisation and the research process. Finally, we discuss the implications of this reshuffling of researcher and practitioner roles, laying out an agenda for researcher–practitioner collaborations in which both theory and practice are challenged through boundary-crossing "praxis encounters".

1.1 | Employee activism and HRM

Organisational scholars have increasingly examined how employees and other organisational members engage in activism within their organisations (Briscoe & Gupta, 2016; Carollo & Guerci, 2018; Girschik, 2020; Meyerson, 2001; Wright et al., 2012). Sometimes referred to as "insider activists" (Briscoe & Gupta, 2016; Girschik, 2020) or "tempered

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radicals" (Meyerson & Scully, 1995), organisational members must negotiate the position of being insiders while challenging the status quo. The resulting tensions create paradoxical situations in which different and possible clashing demands make it difficult for such individuals to situate themselves unproblematically within their organisations (Bartunek & Rynes, 2014; Carollo & Guerci, 2018). Both members and critics, such individuals challenge the insider-outsider distinction, leading to a variety of individual and organisational consequences that have come under increased scrutiny (Briscoe & Gupta, 2016).

Recent employee activism scholarship has examined diverse contexts, from those involving unsanctioned or extra-organisational activities to those in which activism is built into the organisational role. Classical studies such as Dutton and Dukerich's (1991) study of the New York Port Authority show how employees insisted on socially beneficial activity outside of their mandates, to cultivate a sense of ethical identity. Similarly, Creed's (2003) study of gay and lesbian Protestant ministers explored members' voice around organisationally stigmatised topics. By contrast, recent work around corporate sustainability managers (Carollo & Guerci, 2018; Wright et al., 2012) involve organisationally mandated activists, whose job roles include contradictory aspects or who are located at the fault lines of different organisational or institutional arrangements (e.g., Battilana & Dorado, 2010).

The HRM literature contains diverse concepts that resonate with employee activism although the term itself appears infrequently. For instance, discussion of HR managers as change agents has been common since Ulrich's (1997) classical study on the topic. Subsequent literature has developed this notion into the study of change agents as "champions", "adapters", and "synergists" (Caldwell, 2001). Employee activism characterises roles related to organisational social change, such as diversity managers (Jewson & Mason, 1986; Kirton et al., 2007). Despite an increasing awareness of HRM's role in organisational change, however, and despite recent literature acknowledging activism as legitimate protest against injustices (Kelloway et al., 2010), employee activism has often been framed in terms of counterproductive or disruptive behavior (Robinson & Bennett, 1995).

One exception to this negative framing may be found in the emerging literature on HRM and sustainability (e.g., Karatas-Ozkan et al., 2022), which has emphasised the activist role of HR managers and employees as change agents from within (Blazejewski et al., 2018; Renwick et al., 2013). Such scholarship suggests that rather than suppressing employee activism, HR managers can improve their organisations by developing employees' activist motivations and talents. In this capacity, how can HR managers work with activist researchers to further their social missions provides a promising avenue of exploration. At present, despite the growing recognition of the activist roles of organisational insiders, there has been less research addressing the potential role of collaborations around activism and the methodological challenges around studying activism in the workplace.

1.2 | Employee activism as a methodological issue

Given the increasing interest in employee activism and its potential role in organisations' social missions, it is intuitive that managing employee activists would be an emerging topic in HRM. Less obvious, however, are the methodological implications of employee activism and the questions it raises for qualitative research design and analysis. Specifically, while qualitative researchers have increasingly attended to issues around practitioner reflexivity as a source of theoretical insight (e.g., Cassell et al., 2020; Islam, 2015), the fact that practitioners may have histories of struggle from within their own organisations or carry mandates to change the very structures that employ them, are rarely considered in their impacts on the qualitative research process.

Specifically, the tendency to consider organisational members as belonging to a "sample" representing an organisation or as informants within an organisation's "culture" may obscure internal struggles within organisations and overestimate the cohesion of organisational cultures. It may also reinforce a false dichotomy between those who are inside the organisation (practitioners) and those who are outside (researchers), an epistemically marked distinction through which the perspectives of each party are interpreted and analysed. Regarding employee activism as a methodological issue within HRM research raises the possibility of revisiting this distinction and reframing it in new ways.

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Recent literature in contemporary ethnography has focused on revising conceptions of researchers and participants to account for the critical and political positions of insiders (for a review see Islam, 2015). Referred to as "para-ethnography" (Holmes & Marcus, 2006; Islam, 2015) such research integrates the informant's reflexivity, particularly where, immersed in the knowledge society, informants are steeped in formalised theory and anecdotal evidence and can develop sophisticated conceptions of their social systems (for related developments around collaborative ethnography see Bath, 2009; Sykes & Treleaven, 2009; van Marrewijk et al., 2010). Participants' ability to partially adopt an ethnographic position (thus the term "para-ethnography") arises from the "pockets of reflexivity" generated by the displacement between the practitioner's position and the organisational culture (Islam, 2015, p. 239). Para-ethnography finds its ideal model in internal activism, as members engage in reflexivity to analyse their organisation to promote change (Briscoe & Gupta, 2016; Meyerson & Scully, 1995). Studying internal activism involves working with this enhanced reflexivity and thus changes the relative positions of researcher and informant.

The issue of researcher–participant boundaries resonates well with literature around researcher–practitioner collaboration, including collaborative management research (Adler et al., 2004; Shani et al., 2008), action research (Coghlan, 2011; Zhang et al., 2015), mode 2 research (Guerci et al., 2019), insider–outsider research (Bartunek & Louis, 1996) and clinical inquiry/research (Schein, 2013). Each of these research streams involves researcher–practitioner collaborations to develop practical and theoretical knowledge. Despite its diversity, these streams converge on the goal of connecting practitioners and researchers, often involving researchers embedding themselves in practice and practitioners in the research process (Guerci et al., 2019; Mohrman & Shani, 2008). But given the distinct backgrounds, expertise, and professional discourses of researchers and participants (Kieser & Leiner, 2012), collaboration is fraught with dilemmas (e.g., Pedersen & Olesen, 2008) and failure (e.g., Phillips et al., 2018). This has led some authors to declare that "the success or failure of an action research venture often depends on what happens at the beginning of the inquiry process" (Gayá Wicks & Reason, 2009, p. 243). In particular, creating a collaborative space and establishing a relational dynamic are important factors for subsequent collaboration (Gayá Wicks & Reason, 2009; Guerci et al., 2019).

How researchers and practitioners define themselves against each other, weigh up each other's positions, and decide where they can and cannot share ground are important yet understudied aspects of collaborative research. More pointedly, how each position is created dialectically in relation to the other (Bartunek & Rynes, 2014), that is, how each is positioned in a "struggle among discourses and practices" (Mumby, 2005, p. 19), and how their relation can create new possibilities for either side, are important issues for exploration. This is the concern that motivates our research question, "how are knowledge and practice shaped by the dynamics of researcher–practitioner collaborations, in contexts of employee activism"?

Research on employee activists provides an ideal place to examine the dynamics of researcher–practitioner collaborations, precisely because it is a point at which practitioners are struggling against their own organisational limitations, and in which researchers are trying to understand grounded attempts at change, resistance, or critique, while supporting these actions but without being directly involved in them. In these moments, researchers and practitioners may come to see themselves reflected in each other's concerns; what happens in such encounters may illuminate the relationship between research and practice in new ways.

2 | MATERIALS & METHODS

2.1 | Site, background and data collection

Our study took place at Olympia Business School,[1] a French business school founded in the 1980s with around 8000 students and 600 faculty. Olympia began to prioritise sustainability around 2010, including its current "No Pollution" project and a series of sustainability-oriented actions such as reducing waste, providing eco-friendly transport and

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creating faculty working groups around sustainability in pedagogy and research. Sustainability initiatives include staff, faculty and students, and some of them are channeled through research chairs focused on the environmental crisis.

The current business school context was ideal for our research question, given that practice and theory are located literally in the same building, with administrative practice and faculty-led theory crossing at multiple points. The current paper is part of a broader project which sought to study how business schools translate the environmental crisis into action. One part of this project studied sustainability managers' struggles to make their business schools more sustainable. Having to mobilise the whole organisation to align the sustainability and traditional business discourses, these actors work across different discourses and interests (cf. Battilana & Lee, 2014). In our context, the negotiation between economic and sustainable performance, and theoretical and empirical knowledge production, presented a fertile context for studying the dynamics between theory and practice. As such, studying the relationship between the fieldworker and sustainability manager offers the opportunity to examine the relationship between researchers and practitioners.

We focus on a series of encounters with Atalanta, Olympia Business School's sustainability manager. She began working in the quality department of the school until she decided to focus on Olympia's sustainability issues and has subsequently been the main protagonist of the projects described above, working in conjunction with voluntary members of the organisation and recently with a full-time collaborator. The second author introduced the fieldworker to Atalanta in 2019, in the context of a beginning-of-year sustainability project. Atalanta agreed to collaborate in a study of about 3 months of intensive fieldworking, including shadowing, meetings participation and interviews (which later continued in the form of informal discussions, committee participation and more general common involvement in the sustainability programs). During this time, Atalanta also served as a key informant in orienting the fieldworker to the school's projects and in introducing the fieldworker to a broader network of actors, both within and outside the school, who were involved in sustainability projects.

During the data collection period, the first author (hereafter termed “fieldworker”), collected ethnographic data arising from shadowing, formal and informal conversations (Hibbert et al., 2014), and participation in organisational events and meetings (Atkinson & Hammersley, 1994). As described below, a more passive observation role was soon replaced by a more active and interactive participation in the sustainability programs. The early meetings revolved around understanding the particularities of the school's management of the programs, their history and challenges. They also provided a forum to build rapport and trust between the fieldworker and practitioner, through sharing experiences and informal conversations in between meetings (Humphreys et al., 2003). The shadowing was done mainly in meetings between Atalanta and other organisational members, related to projects on pedagogy and research, the development of new initiatives (e.g., a sustainability think tank) and the coordination of work groups (e.g., focusing on recycling, mobility, etc.). Finally, Atalanta's interaction with external stakeholders was observed during a seminar of higher education sustainability managers. The different characteristics of these meetings allowed the authors to attain varying perspectives about Atalanta's role at Olympia Business School, to talk about different projects of the school and to discuss their ongoing collaboration.

In the context of the current research question around collaborations, we foregrounded the interactions between the fieldworker and sustainability manager, placing in the background the specificities of the sustainability program and its dynamics. We thus include data in the form of dialogs about the process itself, in which the parties reflexively make sense of their own projects, their roles and their collaboration. All data were recorded and transcribed using automated software, and the first author manually verified the accuracy of the transcription. All the personal meetings with Atalanta were in English, although French terms or expressions were often scattered throughout the conversation. Field notes were also taken during and after the meetings, to capture the fieldworker's thoughts and insights and to inform the interpretation of these interviews.

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2.2 | Analytical strategy

While our broader data analysis was aimed at understanding the work of sustainability managers more generally, for the purposes of the current study we focused on the researcher–practitioner relationship. To understand this relationship, we drew upon the history of encounters between the first author and the practitioner. These were analysed in concert with the second author, who provided critical questioning and theoretical interpretation at a "distance" (Ybema & Kamsteeg, 2009), and with the practitioner, with whom the encounters were compared and interpreted. This three-way analytical strategy positioned the fieldwork in-between the spheres of theoretical construction and practical interpretation, such that the resulting findings emerged out of an ongoing negotiation with both the practitioner and the academic co-author.

The resulting framing of researcher–practitioner encounters involved examining different moments of contact—which we term "praxis encounter"—in which both parties were faced with open questions about their respective roles, their relation to the work of sustainability, and the production of new ideas. By referring to these as "praxis", we emphasise both their critical aspect in the perception of structural contradictions and tensions, and their practical aspect in working to address those tensions (for an elaboration of the praxis concept in management see Foster & Wiebe, 2010). Moreover, by referring to "moments" we mean to highlight both the temporal flow of interactions between the researcher and practitioner, which involved early, middle and later stages of encounter, and the notion of "moments" as described within critical theory as instantiations of an unfolding dialectic (see Adorno, 1990). Such moments involve critical points at which conceptual and practical impasses are uncovered, tensions are revealed, and new questions become apparent (Fairhurst & Putnam, 2018). By emphasising moments of encounter and their unfolding over the collaboration process, that is, the praxis encounter, we aim to contribute to a dialectical view of researcher–practitioner encounter in which the empirical and the conceptual aspects of collaboration appear as intertwined. The three moments revealed in our analysis—collaboration in the practice space, collaboration in the theory space, and collaboration in the theory–practice space—are illustrated and discussed below.

3 | RESULTS

As noted above, the practitioner–researcher relationship emerged out of a series of interactions, which may be understood as an ongoing dialectic around three progressive collaboration moments which we term the praxis encounter. We illustrate these moments in Figure 1 below.

3.1 | First dialectical moment—Collaboration in the practice space

> ***Atalanta (0:10)***: Okay, tell me what do you want to do, how you want us to proceed, I need you to give me kind of a framework.
> ***Author 1 (0:17)***: Okay, so I thought of… [two] points. One was what you offered: review your calendar. So I can know who you work with, with which groups. At the same time, it would be nice for me to get… an overview of how you are framing your role.

The initial fieldworker–practitioner encounter took place in a meeting room at Olympia Business School, with the intent of defining the terms around which the fieldworker (Author 1) and the practitioner (Atalanta) would collaborate over approximately 3 months. These terms involved a collaboration dynamic (i.e., defining how they would relate to each other) as well as the creation of the collaborative space delimiting what will be the topics for discussion.

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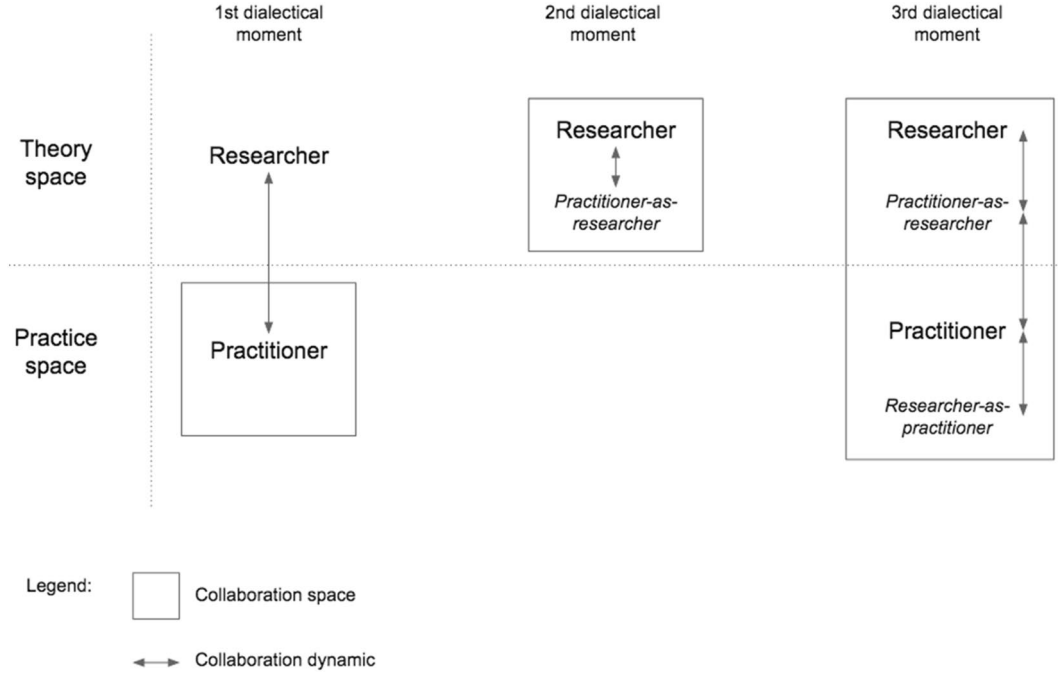

FIGURE 1 The praxis encounter—The development of collaboration spaces and dynamics in three dialectical moments

Discussions on what would be the collaboration dynamics and the collaboration space thus provided the framework for the initial fieldworker–practitioner encounter.

The collaboration dynamic was invoked by the practitioner asking "what do you want to do?", "how to proceed?", "give me a kind of framework". These questions configured the permissible actions in the collaboration, the process of unfolding of these actions, and the characteristics and limits of the relationship. In the above excerpt, the practitioner offers the fieldworker the opportunity to set the collaboration dynamic; instead, he engages in defining the collaboration space.

The collaboration space was configured by the fieldworker as a practitioner space. This was done by asking how Atalanta used her time, who she worked with, and how she saw her organisational role. Positioning the space in terms of these issues, the fieldworker framed what would constitute an overall understanding of the actions, actors, and structure in which Atalanta operated, establishing that the collaboration would be located "there".

While not planned as such, this initial short dialog set into motion a particular way of exploring the theory–practice relationship. The fieldworker's theory work is represented as applied externally over the practitioner field, while the collaboration dynamic remains largely undefined (see Figure 1, first dialectical moment). This was addressed subsequently in a dialog in which the practitioner suggested "therapy" as the collaboration dynamic.

Author 1: So when should we meet?
Atalanta: Yeah, every day, every day, and we should have a timekeeper, we should have something.
Author 1: I'll try to keep time…
Atalanta: It's fine. It's because I look… Like I said, it's my form of therapy. I don't see shrinks anymore. I just talk to people about what I do.

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The therapist–patient metaphor opened unexpected possibilities for collaboration. On the one hand, the therapist is expected to help the patient make sense of her experiences (echoing the previous dialog: "give me a framework") and take responsibility for the relationship ("I'll try to keep time"). Moreover, the patient commits to open her experiences ("talk [...] about what I do"). A therapeutic frame sets the collaboration dynamic.

Given the busy schedule and high-pressure environment of the practitioner's role, the insistence on meeting "every day" surprised the fieldworker, as did the apparent contradiction of combining this request with time limits ("have a timekeeper"). The therapeutic frame resolved this apparent contradiction, expressing a wish to keep an ongoing therapeutical relationship with periodical meetings. Yet the therapeutic dynamic loses its raison d'être absent an external (and subjectively challenging) experience to discuss within the session. The fieldworker and practitioner were thus committed by this collaboration dynamic to maintain a contradictory relationship: a short-term escape from a challenging reality and the perturbation of traditional ethnographic fieldwork, illustrated in the next dialog where the researcher shared his intention of studying the surrounding stakeholders.

Author 1: I would like to see all the stakeholders around you and how you're relating to them.
Atalanta: I don't know…It's gonna be insane! Yeah, no, no, no, it's…
Author 1: I'm sensing that! So I think it would be cool. It would be cool for you to see it, to see how…
Atalanta: That is totally what I've been trying to…sometimes I'll sit down and I'll start them. I have a few of them. But they never go anywhere because I just get…
Author 1: Depressed?
Atalanta: Pulled out…well I kind of get depressed because, oh my God there's just too… I feel like I'm doing too much and…so I stop looking at it and just go back to what I was doing.

Here, the "therapy" collaboration dynamic shows its limits, as the fieldworker presents an expansionist vision for data collection and theoretical construction ("map all the stakeholders"). What seemed intuitive from the lens of fieldwork—including multiple informants to avoid missing information—appeared as a source of stress from the practitioner's perspective ("it's gonna be insane!"). As she explained, the problem was not that mapping multiple stakeholders was impossible, but that seeing herself within a multiplicity of "stakeholders" reminded the practitioner that she was "doing too much", triggering the sense of being "pulled out". The dynamic thus poses expansion versus selection and detachment versus involvement, as choices within the early moments of collaboration.

The collaboration dynamic is also evident in this dialog, as the researcher assumes the role of "therapist" and the practitioner as "patient". The fieldworker seeks uncommon situations to allow the "patient" to explore new possibilities (mapping all the stakeholders would be "cool for you to see it"). The practitioner reveals her experiences with stakeholder-exploration ("I've been trying too"), reflecting on her experiences ("I just get [...] pulled out" "I feel like I'm doing too much"). This collaboration dynamic allowed the fieldworker to learn about the practitioner's experiences while the latter received support and a sounding board in return.

An interesting result of the therapeutic dynamic were the ambiguities around bias and sense-making it introduced. For instance, the fieldworkers' unwitting projection of emotions onto the practitioner ("depressed?"), which slipped out in the flow of conversation, both suggests a "bias" and also a stimulus that opened a sense-making process by the practitioner. Putting a name on ambiguous feelings led to ongoing work by the practitioner to adapt or refute this interpretation, creating a reflexive process that aided in interpreting the employee activism.

In sum, in an initial dialectical moment, the how of collaboration was defined as "therapy" while the what of the study structured the content of the collaboration space. The apparent lack of interactional tensions at this point, as we will see, was not to last, although the collaborative space tensions were already apparent, arising between the fieldworkers' desire for an expansive field of study and the practitioner's desire to keep the scope small to avoid over-commitment, which configured this first dialectical moment. The increasing of these tensions would lead to the second dialectical moment.

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3.2 | Second dialectical moment—Collaboration in the theory space

As the tensions of the defined collaboration space arrangement became more apparent, a restructuration of the arrangement was triggered. In a subsequent meeting, involving both researchers and the practitioner, the context changed to an informal meeting outside of the Olympia Business School:

> ***Atalanta***: But I'm curious how [the Author 1] is going to turn this into…how he's going to delimit the research, how he's going to…identify the indicators…that things are integrated or not, what are they going to be, words? Are they going to be…Is it going to be an example of practice? Process? People? What what what what's your framework?
> ***Author 1***: Yeah, so I'm just thinking about it…

In this brief interaction, the practitioner returns to the earlier tensions, highlighted in questions about how to "delimit the research" and "identify the indicators". At this point, however, the questions extend into the ontology of theory and practice, about their status ("Words?", "Practice?", "Process? People?") and integration.

Interestingly, these issues, which had previously been approached within the practice space, are displaced towards the theory space. This is done by interrogating the study design ("identify the indicators"), the theory–practice relation ("things are integrated or not"), and the construction of the theory space ("what are they going to be"). The final question ("what is your framework?") shifted its meaning from the first dialectical moment—what was a framework for practice is now discussed as a framework for theory. In these interrogations, the research approach emerged as the object of definition and the practitioner shifted collaboration into that space (See Figure 1, second dialectical moment).

Facing the creation of the theory space and of the practitioner's action within it (acting as a practitioner-as-researcher), the fieldworker was puzzled by the deviation from traditional qualitative research practices, in which theory arises in and after empirical encounters. He thus evades the interrogation ("I'm just thinking about it"), but the practitioner insists, and after a few unrelated exchanges, she returns to the topic.

> ***Atalanta***: So how are you going to define this study? What your… what word are you going to use, to identify how schools integrate sustainability?
> ***Author 2***: Well, that's for you to say because you're the truth in this study, right? [The Author 1] just has to reflect what you do.
> ***Atalanta***: (Laughs)
> ***Author 2***: You're the one that's generating the reality here.
> ***Atalanta***: But am I, really?
> ***Author 2***: I don't know!
> ***Atalanta***: A single voice in the mass of discourse

Atalanta restarts the conversation by recalling the tensions in the theory space: the research–practice limits (how to "define this study") and its ontology ("what word are you going to use?"). More importantly, she reinforces the creation of the theory space. This time, the second author challenges this move by trying to shift the epistemic weight back to the practitioner space ("you're the truth in this study, right?"). This statement re-establishes the classical research structure: the empirical field as source of truth and the researcher as reflection and interpretation.

The practitioner responds by laughing, after which the second author pushes the point ("you're the one that's generating the reality here"). Undaunted, the practitioner challenges this position by taking the position of the questioner ("am I, really?"), eliciting an epistemic refusal by the researcher ("I don't know!"). The proposed solution of "ontologising" reality in the practitioner space failed as well and the tensions remain unresolved.

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At this point, the practitioner's intriguing response to this ongoing tension ("a single voice in the mass of discourse") closes the exchange. As a problem of practice, this might be interpreted as highlighting the impossibility of shaping reality with only a single voice in a "mass of discourse". As an epistemological issue, however, it highlights that establishing "reality" may not be possible from the single point of view (that of the practitioner). In the context of the dialog, Atalanta seems to be insisting that the researcher take responsibility in contributing to reality and not watching aloof from the sidelines. A dilemma arose at this point. If both "reality" and its "discourses" depended on both sides of the theory–practice collaboration, the researchers were suddenly recast as actors and the practitioner as a theorist and ethnographer of her own (and the others') experience. Worried by these implications, the second author continued with a revised strategy: changing the method.

Author 2: We'll have to use some kind of haiku or something. Some alternative format or you know, I think this is what you study anyway. That's the irony of it. It comes full circle. Yeah. Because you're actually the theory…
Atalanta: Now I'm embodying it as we would say.
Author 2: Oddly. And that's somehow very pertinent. That's like the perfect performativity theory, which will then get passed through like different levels.
Atalanta: I wonder what the, the, the end result will be…
Author 2: A revolution
Atalanta: Right… or suicide.
Author 2: Yeah, I guess it depends on which tradition you're in…

Confronted with the theoretical and practical consequences of a jointly created reality (see also opening quotation of this paper) in the theory space, the second author jokingly suggests changing the research approach to "some kind of haiku", that is, a short, poetical, ambivalent statement to accommodate the practice–theory tensions. But in the middle of the sentence, Author 2 acknowledges the full extent of the contradiction: "you're actually the theory". The practitioner confirms that she is "embodying" theory. At this point, the initial theory–practice arrangement is acknowledged as a contradiction—in this new moment the roles are reversed, and by striving to maintain theory and practice separated the underlying tensions are laid bare.

Finally, the second author attempts to transform the contradiction into an opportunity ("somehow very pertinent"), retaining a pathway to a more alternative researcher position by invoking avant-garde social theory ("like the perfect performativity theory"). But this attempt runs up against the bluntness of the practitioner response ("I wonder what […] the end result will be"). Exaggerating ironically the practical consequences ("revolution"), he runs up against the equally ironic lack of practical success ("right… or suicide"). The method-reframing gambit fails and the theory–practice contradiction remains active.

As neither classical nor "alternative" methods seemed to address this theory–practice impasse, this second dialectical moment presents the "negative" of the first. In the previous moment and following the dialectical unfolding of thesis (positive)–antithesis (negative)–synthesis (new element), a "positive" collaboration was attempted, while the second moment acknowledged its contradictions, opening possibilities for a new arrangement. More than just an obstacle, the "negative" collaboration was marked by openness and the first joint interaction to resolve the contradiction. More importantly, it created the basis for the resolution of the contradiction in the third dialectical moment.

3.3 | Third dialectical moment—Collaboration in the theory–practice space

The third dialectical moment corresponds to the encounter of theory and practice within an overlapping space, in which the division between the two has been replaced by what we term a "theory–practice space". In this encounter, each actor oscillates between theorising and practical application, maintaining the tension between the two, but adapting to it "dynamically" by alternating roles within the encounter. This third dialectical moment became apparent

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in a meeting between Atalanta and the first author 1 month later in Atalanta's office, in the presence of her assistant and another staff member. This arrangement challenged the previous interaction routine, given that the conversation was in the presence of other colleagues in the context of the broader project of sustainability in Business Schools. The discussion revolved around "raising awareness", a concept appearing throughout the broader sustainability project.

> ***Atalanta***: We're in these discourse wars that are already doing damage to this…this fragile free space that we try to keep free, but it does…it does disservice…to our raising awareness. We're not saying "this is what we're talking about!". "This is what…"
> ***Author 1***: You invited me to a meeting, yes? Where you want to talk about some definitions? That's next week.
> ***Atalanta***: Yeah, and that's what I really want us to do: that we come up with some sort of common definition that not…that I didn't create, that it's not Atalanta again saying, you know…Because I have a global definition of something that I think could work, the one that we can just start hammering and sharing with the faculty especially: what is our definition of what are we doing in these work groups. What is sustainability. Are we going to use… what, what terms are we going to use. So I think it is really important for you to be there.
> ***Author 1***: Yeah, I'll be there.

This dialog opened the practice space to include the fieldworker, establishing a new dialectical moment. Initially framing the situation as a war, it foregrounded the sense of urgency, the need to collaborate, and the possibility of alliances ("space we try to keep free"). Framed as an internal activist, it emphasised the struggle to raise awareness and change the current situation. But the first author intuited a second, less direct meaning, related to the fact that the "we" being affirmed included him.

The researcher remembered that Atalanta had invited him to a meeting to talk about "definitions" and sensing that he was being pulled into this "war", into the practitioner space, he asked for further clarifications. Atalanta elaborated her intentions: she wanted the first author to enter the struggle and constitute a common "front": "What I really want *us* to do is that *we* come up with […] a *common* definition" (emphasis added). The movement towards the first personal plural "we" collectivises the action and draws the researcher into it, after which she interpellates the researcher directly ("it is really important that you be there"). This move constituted a transformed collaboration: the theory, "embodied" in the researcher, entered the practitioner space as a practitioner, what may be termed a researcher-as-practitioner (see Figure 1, third dialectical moment).

The creation of "reality", initially discussed in the second dialectical moment, was now going to be constructed by theory–practice. The researcher, having in mind their previous conversations, the inherent contradictions of their previous space arrangements, and also attracted by the prospect of linking theory to practice, affirms his inclusion in the theory–practice space ("I'll be there"). This new arrangement promised the possibility of moving beyond the previous impasse.

3.3.1 | The creation of the theory–practice space

The theory–practice space was created and tested in the subsequent meeting, where the first author was invited to create a "common definition". Two other faculty members were invited to discuss the topic of the language used around sustainability, one of whom was able to attend. The title of the meeting was eloquent enough: *De quoi parle t'on?* (What are we talking about?). The three-person meeting was held in Olympia School's cafeteria, and Atalanta began by highlighting the dark side of the "therapy" collaboration dynamic.

> ***Atalanta***: You keep recording, you keep recording me! I just imagine you at home listening to me at night, you know, as you're going to sleep…Oh, my God, what a nightmare.

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The dark side of the "therapy" collaboration dynamic was expressed by Atalanta as of being surveyed ("recorded"), losing control ("you at home listening…"), and the difficulty of escape ("a nightmare"). The openness of therapy revealed a dark side of intrusiveness, the challenges of mutual trust as control is lost for both parties, and the necessity of maintaining escape valves to avoid being overwhelmed. The intensification of the new dialectical moment was perceptible at this moment, aligned with a realisation of the experimental and precarious quality of the "therapy" collaboration dynamic.

After deciding on English as the language for the meeting and discussing the difficulties of translation, Atalanta explained her objective for this meeting, kickstarting the collaboration in the theory–practice space.

> ***Atalanta***: So every time you try and lay a brick, it sort of undoes itself. And I am fully and painfully aware of this problem. So the objective of this first, you know, kind of our kickoff meeting around…creating a common definition that will help us move forward. This is probably a very philosophical discussion to have, that I've been having myself…by myself, for too many years. And I want and I'm so grateful and thrilled to start…to share this now internally; that people are actually, you know, are not only interested but feel like they can. So I don't have any ordre du jour [agenda] for today. I kind of wanted to have a conversation and maybe take some notes and… and see if you had any ideas on how we can move forward or if it's already impossible. Maybe we can't come up with a common defining paragraph…

Atalanta highlights three important characteristics of the emergent theory–practice space: the importance of common ground, the blurring of the practice–theory boundaries, and the experimental/risky nature of the dialectical moment. First, reinforcing the need for ongoing construction of common ground in the face of fragmentation ("lay a brick, it undoes itself"), she stressed the need to establish a new way ("kind of […] kickoff") of relating theory–practice—a "common definition" in order to "move forward".

Second, the problematisation of the theory–practice boundaries was characterised as among them and within each of them. Atalanta acknowledges that the challenging of theory–practice boundaries happened in herself (a "philosophical discussion […] that I've been having myself…by myself")—captured in the concept of practitioner-as-researcher—and that it required perseverance, as she has been having this conversation "for too many years". Nevertheless, the contact between theory and practice generated a sense of relief ("I'm so grateful and thrilled") and of empowerment, allowing them to move from "interest" to action ("can"). Practice–theory boundary relations dialectically maintained each space while showing that the necessity of the other for each, while empowering, didn't collapse both spaces; instead, the researcher and the practitioner were now free to act in both the theory and the practice space.

Finally, the experimental nature of the practice–theory space is acknowledged by not having an "*ordre du jour*" [agenda]. Instead, a conversation and "maybe take some notes" marked a beginning that was new, "fragile" and maybe risky. The imperative was to not rush to interpret or decide on a course of action, but "see if you had any ideas". The collaboration between researcher and practitioner was expressed as entering uncharted waters.

Re-examining the "therapy" collaboration dynamic in this meeting revealed the dark side of the interaction mode, while the establishment of the theory–practice collaboration space was based on the need to build common ground. The end of the meeting was the affirmation for a hopeful, yet risky, attempt to build a new way of working together.

3.3.2 | Collaboration in the theory–practice space: Two illustrations[2]

The following dialog illustrates an early moment of integration of theory and practice, with the researcher-as-practitioner trying to apply theory to practice, and the practitioner analysing the effect of this implementation. We termed this dynamic collaboration in the theory–practice space because it focused on the contact of theory with concrete action through partially blurred boundaries (see Figure 2).

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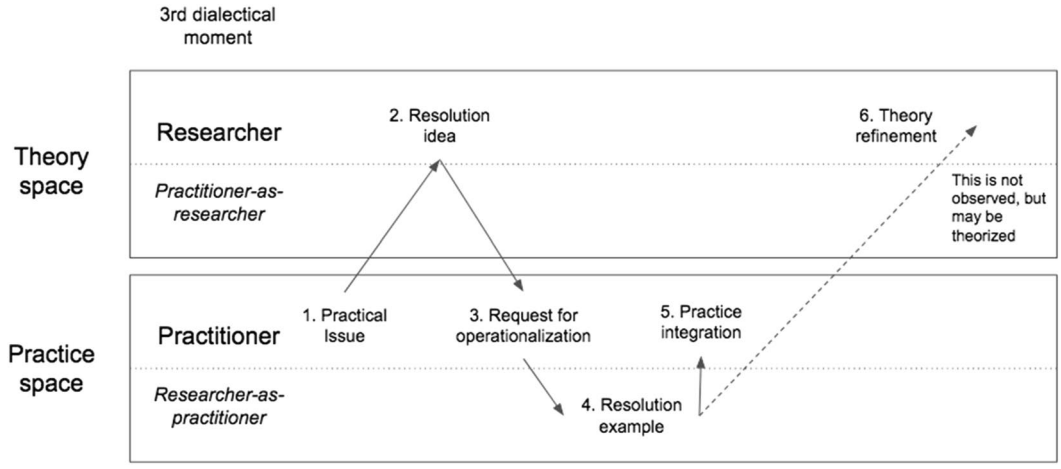

FIGURE 2 Illustration 1—The dialogic relationship between theory and practice in the theory–practice space

The fieldworker–practitioner conversation had shifted towards how democratic ways of decision making were used in the business school. Atalanta shared her worries about how sometimes this decision-making mode resulted in slow, conservative decisions, impeding more radical changes. The fieldworker replied by invoking social theoretic concepts about radical democracy taken from recent academic discussions:

Author 1: In this radical democracy, the thing is that all the differences are exalted. Groups are made within the…it's not like individualism to the extreme. It's groups to the extreme…many groups [is the ideal]. And [society advances] when different groups are articulated. This is just one idea of how…how democracy could be radicalised.

Atalanta: You operationalise that, please, give me a concrete example of how it would look here?

Author 1: The comité de pilotage RSE [CSR steering committee] is a good…is a good example of radical democracy. Because there you're making groups. And maybe a good idea is to continue making more groups.

Atalanta: That was the question in the last meeting, should we create more groups? That's funny that you bring that up.

Author 1: I was going to say something, but then I thought…

Atalanta: Why didn't you?

Author 1: Maybe I will keep being a researcher still…

Atalanta: Argh…

Author 1: I will, I will, I will sometimes… like right now. But I do prefer to know when…when to interact.

This conversation is interesting in that it illustrates collaboration as a dialog between theory and practice, while showing the simultaneous overlap and tension between researcher and practitioner positions. Moreover, these tensions remain even in the mutual appreciation of the other's views and involve an ongoing set of role negotiations. Each of these aspects merits deeper elaboration.

First, the conversation exemplifies a new dialogic relationship between theory and practice (see Figure 2). The researcher invokes theory to ground an approach to a practical problem that had been elaborated by the practitioner. When the practitioner asks for an operationalisation of that theory, the researcher points to an example in the organisation, allowing the practitioner to connect theory to practice ("That was the question in the last meeting, should we create more groups?").[3] Second, the simultaneous overlap and tension between the positions is evident from their dialog. As the researcher takes his first steps into the unknown territory of

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practice ("this is just one idea"), the practitioner challenges this step with a request for rapid action ("you operationalise that"), a demand for directness ("concrete example"), and contextualisation ("how it would look here"). In the situation of the researcher-as-practitioner, inhabiting the practice space involves confronting its rules and considerations, making evident the tension with an overly abstract theoretical stance. Third, from this dialog we note the persistence of tensions in the theory–practice space: the researcher hesitates about when to take the position of a researcher-as-practitioner ("Maybe I will keep being a researcher still" and "I do prefer to know when…when to interact"), while the practitioner shows impatience ("Argh") with the continued distancing from practice.

In this example, the researcher and the practitioner test the new theory–practice space and reveal its dialectical aspect, involving both common concerns and an enduring separation. Attempting to bring theory into practice, the researcher does not neutralise the theory–practice contradiction and the tension persists. Future interactions between the researcher and practitioner could require new dialectical moments to deal with these tensions.

As a second example, we draw from the "What are we talking about" ("*De quoi parle t'on*?") meeting to illustrate the researcher–practitioner collaboration dynamic across theory and practice spaces (see Figure 3):

> ***Atalanta***: When [the top management team] started tweeting that they wanted to be a "No pollution" school and I started having… I didn't know how to grapple with that. "I'm not doing this", "I'm quitting" or I have to do something that will allow me to stay engaged radically… on all the spheres of CSR, sustainability, whatever. And so, this was the document that I presented to him. I said, "I'll go if we can approach the 'No Pollution' [level]".
> ***Selene:*** Yeah, I find it very funny because it's really clever actually. You use like this "No Pollution" thing that can be like an empty shell completely and then you put everything in there like…
> ***Author 1***: Yes, Laclau is also about that. So he has the empty signifiers… An empty signifier is this: an empty bag where you put everything you want. And it's everything to everyone. So it's very easy to [connect] people here. Maybe this is a good chance, because ["No pollution"] won't be opposed. The [top management team] already said "we want to be 'No pollution'". Okay, let's be "No Pollution". And this I may advance from my other interviews. When I asked about "No Pollution", people always comes to: "But what does it mean to be 'No Pollution'?" There's always that. They all have the same answer. But I think that's good. Because there's an opportunity to start opening and working with them, and making everyone make, in a way, their own definition. So they can get engaged into this big tent. So you don't have to fight that.

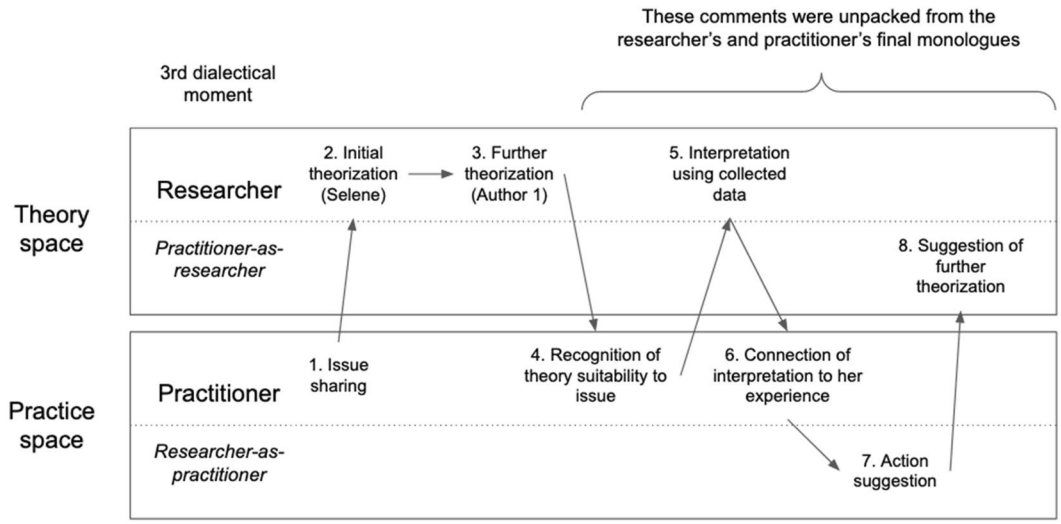

FIGURE 3 Illustration 2—Example of collaboration within the theory–practice space including role inversion

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Atalanta: But that's literally what happened. And that's why I went, "Oh, maybe this really is an opportunity" instead of going "My life is hell". People automatically started saying: "Atalanta, what are we doing around 'No Pollution'?" And I'm like, "Well, I don't know, what do you want to do?" People started saying "I can do this" and started taking over things that they should have been taking over already. And moving forward on it. It was kind of audacious… I don't even know. I want to put some terms. I don't want to say that, you know… Either [the top management team] was brilliant and knew exactly what they were doing. Or I was brilliant and I was able to recuperate a potential disaster.

This conversation illustrates a theory–practice dialog, including an inversion of roles where the researcher proposes practical strategy and the practitioner theorises (see Figure 3). The researcher attempts to apply theory (Laclau) to practice, following the cue of the other faculty present at the meeting (Selene). The researcher uses information "advanced from other interviews", using empirical data to apply theory to practice ("there's an opportunity to start opening and working with them"). The practitioner confirms this attempt ("that's literally what happened"), but in contrast to the earlier example, she shows her intention to return to theory ("I want to put some terms"), entering the theory space as a practitioner-as-researcher. We interpret this conversation as an example of the dialogic relationship between theory and practice and vice versa, with the added element of a movement from the practice space to the researcher space and an inversion of traditional roles, with the researcher-as-practitioner strategising for practice and the practitioner-as-researcher seeking to develop theory.

The final moments of the conversation involve a mutual elaboration of each actor's contributions to the ongoing movement between theory and practice. Conceived as an oscillation (see Figure 3), this involves the practitioner sharing a practical issue ("I have to do something that will allow me to stay engaged radically"), followed by the other faculty member offering a conceptualisation ("'No pollution' […] can be like an empty shell"). This is further elaborated by the researcher as linked to a theoretical tradition ("Laclau is also [theorising] about that"). At this point, the dialectical collaboration begins as the practitioner recognises the salience of the theoretical move ("that's literally what happened") and the researcher confirms and populates the idea with empirical data ("advanced from the other interviews"). The practitioner then connects the data sample with her own experience ("People automatically started saying: "Atalanta, what are we doing around 'No Pollution'?""). By that point, the earlier roles had inverted, with the researcher-as-practitioner making practical suggestions ("let's be 'No pollution'"; "there's an opportunity to start opening and working with them"; "you don't have to fight that") and the practitioner-as-researcher seeking conceptual clarity ("I don't even know, I want to put some terms").

4 | DISCUSSION

We began our study by asking how researcher–practitioner collaborations take unique shapes in the context of employee activism, an area in which, on one hand, employees must reflexively analyse and critique their organisations, and where researchers are often (implicitly or explicitly) implicated in the processes of change sought by practitioners. Given that such situations stimulate rethinking the practical and epistemic roles of researchers and practitioners, our study sought to examine how this rethinking unfolds in the process we term "praxis encounter".

The three dialectical moments described above show different arrangements in the research collaboration between practitioner and researcher (see Figure 1). In the first moment, the collaboration dynamic ("therapy") and the collaboration space (practice space) were defined and tested. Tensions arose subsequently when theory was applied to the practice space. These tensions were explored in the second dialectical moment, when the practitioner attempted to solve them by demanding the creation of the theory space and entering it as a practitioner-as-researcher. Faced with the researchers' resistance, both parties confronted their contradiction. In the third dialectical moment a new type of space was created (the practice–theory space) with a different dynamic involving a dialogical relationship between theory and practice and the inclusion of the researcher as "embodying" theory (the researcher-as-practitioner).

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Through these three dialectical moments the researcher and the practitioner explored the relationship between theory and practice, which finally became integrated into a theory–practice space.

Our contributions with this paper are twofold. First, we contribute to the research collaboration literature by presenting an empirically based theorisation of the initial stages of a research collaboration. Concretely, we present the initial creation of a theory–practice space and the collaborations that unfold within it, using the notion of a praxis encounter to describe the reflexive and dialectical aspects of those collaborations. Second, we contribute to the HRM literature by presenting a collaborative approach for studying employee activism, while expanding the role of the employee activist from change agent to reflexive agent. Moreover, we contribute to HRM practice by showing how HR managers may support activist employees while integrating academic approaches in their practice.

4.1 | Praxis encounter: Researcher–practitioner collaboration in the context of employee activism

The concept of the praxis encounter contributes to the theory–relevance debate (Cohen, 2007; Kieser & Leiner, 2012; Shani & Coghlan, 2014) by showing how practitioners and researchers shape a collaboration space and dynamic. The praxis encounter involves the build-up of a dialectical theory–practice space, where researchers and practitioners collaborate dynamically. When entering the other's space (e.g., the practitioner entering the theory space), each "embodies" a disciplinary position (e.g., practitioner-as-researcher) which allows direct interaction from the position of the other (e.g., theorising done by the practitioner-as-researcher). This dialectical moment neither creates a new space nor dissolves the distinct positions of theory and practice; instead, it allows a rapprochement and a mutual positioning (Mohrman & Shani, 2008). It blurs the limits between the two spaces (Islam, 2015, p. 236), while the collaborators participate in the other space and its logic (cf. Kieser & Leiner, 2012, p. 20), even as such moments of crossing simultaneously reaffirm the respective projects as distinct. Following Bartunek and Rynes' (2014) call for a more dialectical approach to collaborations, we elaborate such an approach, which is distinct from the development of a new collaborative logic (Kieser & Leiner, 2012) and moves beyond a direct research collaboration (Shani & Coghlan, 2014). By elaborating on the dialectical moments worked out through the praxis-encounter between researcher and practitioner, our study extends and develops the dialectical project called for by Bartunek and Rynes (2014).

The current study also contributes specifically to understanding the initial stages of researcher–practitioner collaborations (Gayá Wicks & Reason, 2009; McArdle, 2013; Phillips et al., 2018). Gayá Wicks et al. (2009) note the conditions of inclusion, control, and intimacy at the initial stages of action research. In the praxis encounter, inclusion is conceived as a partial blurring of theory–practice boundaries, intimacy as a collaboration dynamic ("therapy" in the current case), and control as the eventual reaffirmation of theory and practice spaces and their mutual relationship. Our study, by empirically grounding the initial stages of exploring together and designing collaborative spaces and research mechanisms, informs the "double-loop" research processes delineated in Mode 2 (Guerci et al., 2019). We show how distinct collaboration spaces and dynamics (see Figure 1) emerge, giving rise to hybrid roles (practitioner-as-researcher and researcher-as-practitioner) that enable cross-participation (see Figures 2 and 3). In the context of debates about how academic and practice loops overlap in collaborative research (Guerci et al., 2019, p. 2), employee activism provides a case in which each sphere contributes to but remains distinct from the other. Tracing these ongoing moments of relational work provides a tool to understand the quality of relationships within research collaborations (Mohrman & Shani, 2008).

What this dialectical perspective contributes to literature on collaborations involves their dynamic and shifting aspects. Most researcher–practitioner collaboration literature questions role independence and advocates greater cross-communication (e.g., Karra & Phillips, 2008; Reedy & King, 2019). By contrast, we locate both independence and interdependence as shifting positions within an ongoing relationship, where both serve different purposes at different moments. Rather than making research "practical" in the sense of recent impact literature (for a critique see Rhodes et al., 2018), or making practice "evidence-based" or scientific (e.g., Pfeffer & Sutton, 2006; Rousseau

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& Barends, 2011), we describe an ongoing tension in which neither theory nor practice are subsumed in the other but continue to challenge from a distance while recognising their mutual interdependence. The combination of a processual–dynamic view with a relational interdependence view means that the ideal relation between theory and practice at a given moment cannot be pre-determined, but must be worked out in praxis encounters, resulting in a pragmatic yet reflexive and ongoing relationship.

4.2 | Studying and supporting activist employees as reflexive agents

This paper's second contribution is to the HRM literature, especially to studies of HR managers as change agents (Caldwell, 2001; Jewson & Mason, 1986; Kirton et al., 2007; Ulrich, 1997) and to HR's role in environmental activism (Blazejewski et al., 2018; Renwick et al., 2013), by examining collaborative approaches to researching employee activism. Activists' organisational change goals imply reflexivity in thinking about the roles of actors in society. Taking cues from para-ethnography (Holmes & Marcus, 2006; Islam, 2015), such reflexivity reflects practitioner proto-theories that can inform and dialog with academic researchers. While researchers can help in developing such proto-theories, they can also use these "epistemic fragments" (Islam, 2015, p. 239) to develop a better understanding of their own theories, including those about employee activists themselves.

By taking a para-ethnographical perspective, we contribute to understanding HRM practice by conceiving of activist employees as reflexive agents (Cassell et al., 2020; Islam, 2015). HR managers can support the effort of these employees by recognising this reflexivity, and in some cases these roles may be located within HR itself (e.g., diversity officers). Promoting collaborations with researchers can give emotional and intellectual support to activist employees, who often experience intense paradoxical tensions (Carollo & Guerci, 2018; Meyerson & Scully, 1995; Wright et al., 2012). HR managers should be aware of the internal tensions and subjective experiences of employee activists, which, among other implications, may have effects on organisational commitment, motivation, and well-being. HR managers can be instrumental in promoting worker well-being, and furthering the social missions of organisations, by promoting such collaborations and taking a proactive role in employee activism.

Reframing internal activists as reflexive agents reveals them as a source of organisational value, whom HR managers may support in their attempts to improve the social value of organisations, while bringing in researchers to support this goal (for reference, see the Practitioner Account accompanying this article). From the researcher side, we can recognise our own enhanced understanding of employee activism through our collaborative research as well as the relationships (and contradictions) between theory and practice in trying to achieve the social goals of organisations. Understanding practitioners as reflexively positioned between competing demands, struggling to find their own positions, and weighing ethical, social and practical goals allows us to build a new perspective for practice as complex idea-work, with activists often bringing theoretical and empirical study to their areas of concern.

In the case of collaborations around employee activism, such crossovers between theory and practice are particularly acute. Because researchers are often concerned with the social or environmental themes of activism, and activists are often highly theoretically aware and informed around their areas of concern (e.g., Briscoe & Gupta, 2016; Reedy & King, 2019), there is a natural mingling between researcher and practitioner in these kinds of settings. Caught in the tensions arising from multiple logics or norms, leading to identity and value struggles (Battilana & Lee, 2014; Doldor et al., 2016), activists are likely to adopt a critical distance towards their organisations that makes them ideal informants for academic researchers. In the moments of "praxis encounters", these mutually shared aspects must be worked out between researchers and practitioners.

In such situations, researcher–practitioner collaborations are likely to have unique qualities and potentials as compared to those outlined in current literature (Islam, 2015; Reedy & King, 2019). Rather than applying theoretical or evidence-based solutions to pre-existing organisational problems, researchers may provide ways of reframing or theorising problems, or provide a safe sounding board for practitioners who may not agree with their organisation's framing of a given issue. Collaboration with a researcher may thus provide a useful ally and legitimating force for

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ongoing activist work in a practice setting marked by tensions or struggle. By the same token, practitioners' everyday coping activities constitute proto-theories that meet the researcher halfway between data and academic theory. Engaging in such collaborations requires ongoing negotiation between two (or more) parties whose boundaries would otherwise have been clear, but which in such contexts are deeply porous. In the current setting, these negotiations involved constructions of the collaboration space, tensions over the respective roles of the parties involved and creative remaking of relations to address those tensions. The result was to recast the practitioner as a reflexive producer of theory and the researcher as a collaborative strategist with a critical perspective on action.

5 | CONCLUSION

Given the previous discussion, several directions may be highlighted for a future research agenda around the dynamics and complexities of researcher–practitioner collaborations. The current study involved an in-depth ethnographic immersion with a key informant, who occupied a position of organisational authority. Thus, the theory–practice relationship could be modeled as a dyadic exchange between the fieldworker and the sustainability manager, and the complications occurring from within this relationship. However, many practice contexts involve multiple actors with diverse interests (for research collaboration in complex networks see Huzzard et al., 2010; Shani et al., 2008) including different intentions as to the goals and extent of academic study (Alcadipani & Hodgson, 2009). We thus present a simplified case of praxis encounters, and future research should consider this plurality and the possibly contested nature of practical settings themselves. How this plurality shapes the "dialectic" into something more like a "multi-lectic" situation requires further study.

Similarly, the context we studied—a sustainability program within a business school—is a particularly rich setting for theory–practice hybrids. To the extent that one of the defining features of business schools is to straddle academic and applied spheres (Murillo & Vallentin, 2016), researcher–practitioner overlaps may be particularly appropriate in such settings. In this respect, the current case may be paradigmatic, and research should examine settings where academic work (or conversely, applied practice) is not built into the constitution of the organisation. In such settings, one would expect a more acute struggle, perhaps with less mutual understanding, than in the current context.

Finally, employee activism is inherently related to contestation within organisational settings (Briscoe & Gupta, 2016), while also related to social scientific (and especially critical) research (e.g., Reedy & King, 2019). Activists may draw on social theories and research to develop and ground their opinions, in a way that may not apply to all kinds of practitioners. Thus, in the current study, there may have been an affinity between the employee activist and the activist ethnographer (Reedy & King, 2019) facilitating their dialectical exchange. Situations in which alignment of social or political visions does not exist pose distinct challenges. For instance, how employee activists could mobilise results or evidence from non-activist researchers, or how critical researchers could bring an activist agenda to indifferent or hostile practitioners, are likely common situations that need exploration.

In conclusion, focusing on researcher–practitioner collaborations as praxis encounters, we recognise the epistemic capacities of practitioners while recognising the action potentials of researchers, arguing that their dialectical interaction can provide ongoing insights on both sides. The goal of this process is to build reflexivity around practice while building activism around theory, avoiding the colonisation of one by the other. While the delicate balance remains more of a goal than an achievement, it provides a horizon against which to measure the increasing rapprochement of academics and their publics. As with many things, it is the struggle rather than the outcome which may make such attempts most valuable.

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CONFLICT OF INTEREST

We have no conflicts of interest to disclose.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are available from the corresponding author upon reasonable request.

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ENDNOTES

[1] All names of individuals, projects, and organisations are pseudonymous.

[2] See Appendix 1 for one additional example.

[3] See Appendix 1 for an example in which theory is affected itself by practice.

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APPENDIX 1: ILLUSTRATION OF THEORY–PRACTICE COLLABORATION PRESENTING AMBIVALENCE IN RESEARCHER AND PRACTITIONER POSITIONS

Extract from the conversation taking place during the "What are we talking about" ("*De quoi parle t'on?*") meeting:

> ***Author 1***: I was going to mention two things. Last two things, maybe. One is about personal work time, because I think that… So, what do you want to tackle? Do you want to [tap onto] more of people's free will? Or free… free personal time? Do you want to integrate this into their work responsibilities? So I think that there's… there's something to think about…, because there's so much that people can do in their personal time. Something, but not enough.
>
> ***Atalanta***: This has, you know, I'll send you… I don't think I've sent this to you. I created this tragedy… I created a tragedy in 2015 (laughs)! [I created a plan] with key strategic axis. That has been my priority. That people have, in negotiation with their manager… a percentage of their mission dedicated to sustainability issues. It's already in their job descriptions, in their annual evaluations. And I really think that it's important that we do that. So I've had a discussion with the new HRs person. But at the same time you [need to] institutionalise it. I've worked with people since 2009 on this, and it hasn't been in their mission, and I see that they stopped doing it after a while when it's not recognised by the institution.
>
> ***Author 1***: But here you could… For example, and this is the other comment, it's about… So one is about personal work time, and willingness and dedication; and the other one is about incentives: how much are people incentivised and in which way… to do things.

In this dialog, we illustrate the movement between theory and practice as well as its limits: the ambivalence of the attempts to classify theory and practice into theory or practice spaces (see Figure A1). The Author 1 presents a question about practice ("Do you want to [tap onto] more of people's free will? Or free… free personal time?") and its implication ("there's so much that people can do in their personal time"). Atalanta replies by recognising the issue and sharing her past solutions ("That has been my priority. That people have […] a percentage of their mission dedicated

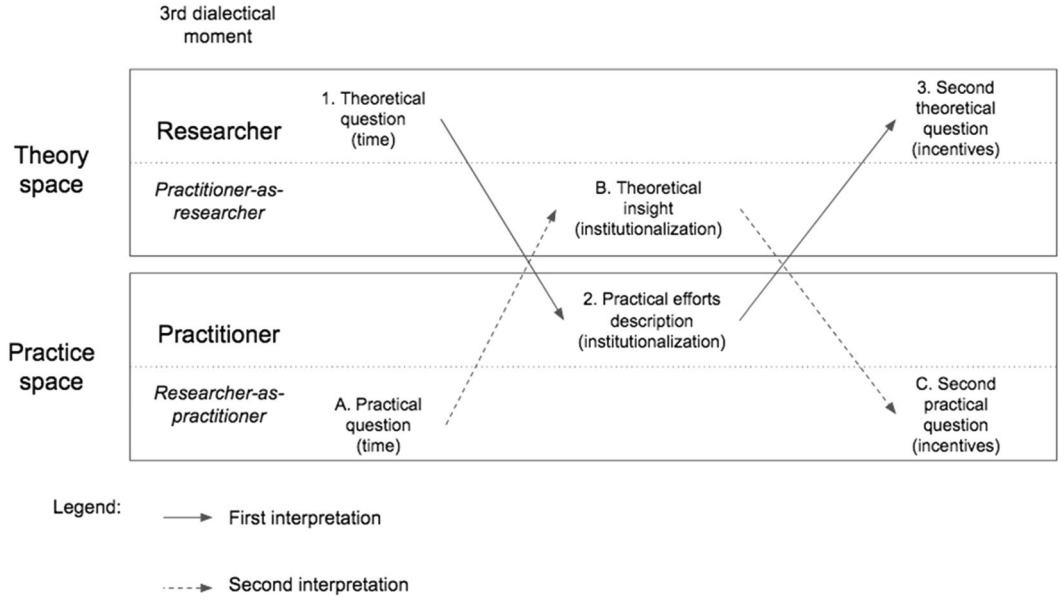

FIGURE A1 Example of collaboration within the theory–practice space, presenting ambivalence in researcher and practitioner positions

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to sustainability issues"), together with the limitations she has faced ("they stopped doing it after a while when it's not recognised by the institution"). The Author 1 finalises the dialog by sharing his second question about practice ("how much are people incentivised and in which way… to do things.").

There are two possible interpretations here. The researcher's comments may be read as emanating from theory, reflecting his interests in understanding the relationship between employee's time and sustainability challenges. He finally presents a second theoretical doubt, regarding incentives and people's engagement with the sustainability projects. However, his comments may be interpreted also from the point of view of practice: he refers to the practical strategies and tactics to liberate Olympia employee time for sustainability projects, as well as how to incentivise action. The same ambivalence may be observed in Atalanta's response. On the one hand, she is describing her practical efforts to liberate time and the challenges posed by a lack of institutional support. Yet, she theoretically examines the use of institutionalisation to harness time ("at the same time you [need to] institutionalise it"). In both cases, both "theory" and "practice" interpretations seem plausible.

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