Using Action Research to Support an On-going Organizational Culture Transformation

in a Health Care Organization

A Dissertation

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Abstract

This study explored the use of action research to support an on-going large-scale organizational culture transformation at a health care organization based in the Midwest. The Plano Clark & Creswell (2015) eight-step action research process was used to guide the study done by the Culture Action Research Team (CART), which consisted of eight employees. CART identified eight opportunities to support the on-going culture transformation. Three opportunities were researched further, with the decision to implement one of these ideas – the new employee experience which would create a consistent, welcoming experience for all new employees joining the organization. The team gathered and analyzed data, developed a three-phase implementation plan, created the communications and creative theme, established an implementation process, implemented the updated communications, and evaluated and reflected on the process. Results indicated that the updated process had a positive impact on new employees and hiring managers to support the on-going culture transformation. Based on the research process, the team identified five enablers (employee involvement, systems thinking and practice, senior leadership support, champions within the business, and communications) and two barriers (resistors and the matrix environment within a large organization) to culture change. Additionally, the team identified lessons learned to apply to future change opportunities.

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Chapter 1: Introduction

The U.S. health care industry has undergone considerable upheaval and public scrutiny over the past 30 years (Worley & Mohrman, 2014). Currently, according to Senator Durenberger (2015), the health care industry is experiencing the most "disruptive" systemic innovation in our history due to the many regulatory changes and challenges as a result of the Affordable Care Act (ACA), which President Obama signed on March 23, 2010. This action, usually referred to as health care reform, started to phase in numerous changes in 2011, having "(at least) 3 major goals: (1) expanding coverage (and "reforming" the individual insurance market), (2) slowing health care spending and keeping it at a sustainable rate, and (3) improving clinical quality" (Wilensky, 2015, p. 671).

Because of the policy changes and the ongoing debates, "the interconnection between the vast, complex American health care system, federal and state bureaucracies, economic factors, and political leadership tension will require shrewd balance and protection of stakeholders' interests – patients, physicians, providers, and politicians" (The Lancet, Oct. 24, 2015). To address the current challenges of health care costs and government regulations, while managing the delicate balance of numerous stakeholders, health care organizations are seeking ways to do business more efficiently and effectively, as "experienced health care professionals and state policymakers are currently engaged in systemic reform experiments" (Durenberger, 2015, p. 665). These experiments are accelerating both the rate of change and the level of uncertainty confronting the industry (Buescher & Viguerie, 2014).

With the increased rate of change and uncertainty plus the added pressure from the ACA implementation, the health care organization in this study chose to change its organizational culture, serving as a common frame of reference to encourage collaboration and innovation. Shifting the organizational culture was strategically important for the study organization, as Ribando and Evans (2015) noted that a dynamic culture should change as the organization changes and the old culture behaviors considered part of their success are no longer effective. Furthermore, researchers concluded that culture management has displaced change management as the practice that has the greatest impact on performance by enhancing the effectiveness of employees and organizations (Brockbank, Ulrich, & Yakonich, 2002).

However, making large-scale changes is not easy, as researchers reported that the great majority of change efforts fail (Choi & Behling, 1997; Kotter, 1995). "Given the dismal record of organizational change, it is imperative that a prescriptive protocol for effective and rapid change be made available to practitioners" (Griffith, 2010, p. 2). How practitioners impact culture change is still unknown, needing further research. Furthermore, research is required to best support the dramatic, constant changes occurring within the health care industry.

As a result, the focus of this study was to further the research regarding employee involvement in an on-going organizational culture change effort. The purpose of this study was two-fold: (a) to further the organization's on-going culture transformation and (b) to develop employees at a health care organization to better understand organizational culture and change management concepts to support this change and future changes.

The growing interest in organizational change is likely "prompted by the relentless need for organizations to grow and reform at intervals so short that change has become a continuous demand" (Wheatley, 2006, p. 158). Numerous change management authors emphasized the importance of employee involvement during the change process (Conner, 1992; Fullan, 2008; Hall & Hord, 1987; Kahan, 2010; Wheatley, 2006, 2009). "While it is important for leaders to involve employees under normal circumstances, it is even more critical to involve them during an organizational change, particularly when that change has an impact on the underlying culture of the organization" (Burt, 2011, p. 5). This employee involvement can take a number of forms, ranging from listening to including everyone in the organization to cultivating relationships (Kahan, 2010). Perhaps the most important reason to involve employees is that one of the most commonly cited reasons for change implementation failure is not appropriately addressing people-related issues in the change process (Kotter, 1995; Maheshwari & Vohra, 2015; Spiker & Lesser, 1995).

Change, however, does not occur in isolation. "Change cannot succeed without a network of sustaining sponsorship that constantly reinforces the importance of a change as it moves through the organization" (Conner, 1992, p. 121). Changing organizational culture, however, is not as easy as it may appear, as there is very little understanding of how organizational culture works in practice because culture is created and evolves over time (Alvesson, 2002).

Statement of the Problem

Organizational culture is highly complex and includes shared beliefs, behaviors, and assumptions of people. "Understanding, and dealing with, culture is strategically important for organizations" (Hofstede, 2015, p. 566). Changing an organization's culture requires employees to alter what they say, in addition to altering the myths, rituals, symbols, and signs that signify the preferred change (Ford & Ford, 1995). Making these changes is not easy, however, as change programs often fall short (Beer, Spector & Eisenstat, 1990). How practitioners can impact culture change is unknown, needing further research. Beer, Spector, and Eisenstat (1990) found that very little changed in organizations where strategies were "sold" to employees and followed up with communication and implementation plans. Rather, successful companies leveraged employee involvement to identify and implement desired behaviors and competencies to achieve their goals, leading to the preferred culture (Maheshwari & Vohra, 2015).

To achieve these goals, leadership behavior is key to driving culture evolution (Kotter, 1996; Schein, 1999). Kotter (1996) noted that "management is a set of processes that can keep a complicated system of people and technology running smoothly . . . leadership is a set of processes that creates organizations in the first place or adapts them to significantly changing circumstances . . . successful transformation is 70-90 percent leadership and only 10-30 percent management" (p. 25-26). Schein (1999) found that leaders controlled mechanisms that influenced culture, including how to adapt to the environment, evolve workgroups, empower subcultures that represent ideal norms, and create committees to manage the culture.

Because of the importance of culture, managing culture has displaced change management as the practice that has the greatest impact on performance (Brockbank, Ulrich, & Yakonich, 2002). As a result, this study furthered the research regarding employee involvement in an organizational culture change effort.

Purpose of the Study

The purpose of this action research study was two-fold: (a) to further the organization's on-going culture transformation and (b) to develop employees at a health care organization to better understand organizational culture and change management concepts to support this change and future changes. This study focused on incorporating employee involvement through the action research process to identify and implement changes to support an on-going culture transformation. Using action research to solve business problems and develop employees "affirms that experience can be a basis of knowing and that experiential learning can lead to a legitimate form of knowledge that influences practice" (Baum, MacDougall, & Smith, 2006, p. 854). One way to involve employees in problem identification, analysis, and resolution to achieve change is through participation such as action research (Rachele, 2012). Moreno (2015) supported Rachele, noting that "initiating a project is an opportunity to concretely alter reality through actions" (p. 178).

The advantage of action research is the opportunity to introduce, evaluate, and refine changes within a practical setting. "Action research [AR] – with its focus on action and change – cannot be accused of failing to engage in resolving practical problems" (Greenbank, 2013, p. 145). "From pragmatism, particularly the views of John Dewey and Richard Rorty, AR takes the idea that research cannot construct significant meanings without engaging in practical action. Without action, there is no research. Without pragmatic action, in a system of collaboration among all the stakeholders, there is not only no change but also no meaningful and sustainable theoretical learning" (Greenwood, 2015, p. 200).

The practical significance of this project was to further the on-going culture transformation of an organization by involving employees and creating culture champions across the organization, with the support of senior leaders and organizational resources. The employee involvement in this type of research is designed to help sustain the on-going culture transformation, as well as provide leadership additional information that helps them understand and support an appropriate organizational culture, which can be a powerful capability to create competitive advantage. Furthermore, findings from this research may provide fresh insight regarding the lessons learned about employee involvement, change management, and culture transformation.

The Research Questions

Research noted that organizational culture shifts, particularly in large organizations, are difficult to accomplish and often fall short of expectations. As a result, this study focused on how to support an on-going organizational culture shift to meet the on-going changes and challenges within the health care industry. Specifically, this study posed the following research questions:

1. How might the organization prepare to support its on-going culture transformation?
2. What tools, processes, and initiatives can the organization explore to support the existing culture shift?
3. How can the organization engage leadership at numerous levels to support the culture shift?
4. What are the enablers of successful culture change?
5. What are the most common barriers or deterrents to culture change?

Significance of the Study

With today's competitive landscape, organizations are eying ways to create a competitive advantage for organizational success and growth, particularly with ongoing health care reform changes. "Organizations in the healthcare eco-system began to explore and introduce new approaches, thus starting the process of fundamentally re-crafting the industry and the relations among the involved parties" (Worley & Mohrman, 2014, p. 218). One of the approaches to create this competitive advantage is through an organization's human resources, including human relationships, innovative ideas, and performance – all aspects that comprise an organization's culture.

Atkins and Turner (2006) posited that culture is important because it can be the difference between the success and failure of an organization. Organizational culture impacts virtually every aspect of organizational life, from how decisions are made, to how rewards are distributed, to how people are treated. According to Hofstede, Hofstede, and Minkov (2010), "no group can escape culture" (p. 12). "Culture refers to the deep structure of organizations, which is rooted in values, beliefs, and assumptions held by organizational members" (Denison, 1996, p. 624). Organizational cultures evolve over years and can be considered the soul of an organization (Mike & Slocum Jr., 2003).

Because culture is important to organizational success, it is a topic of interest to researchers and practitioners. "Researchers are looking for explanations, and they are trying to understand and conceptualize organizational culture, its nature, its key determinants and predictions, as well as the relationships among culture's diverse set of variables. Practitioners are interested in the management of organizational culture, and they are looking for answers and solutions: how can an organization's culture be changed and adjusted to meet organizational needs?" (Jung et al., 2009, p. 1087). Organizational culture is likely to remain a complex, highly contested concept, and there is debate regarding how to research organizational culture. "This is reflected in the varied nature and characteristics of the identified instruments, which offer dimensional, typological, quantitative and qualitative approaches, as well as combinations thereof" (Jung et al., 2009, p. 1092).

While researchers and practitioners are interested in the topic of organizational culture, there is a void in studies that propose how to enable culture change within large organizations (Plakhotnik & Rocco, 2011). This void in how to implement large-scale culture change has long been recognized, as Barney (1986) suggested that managers could benefit from information that could help them understand how to create a strong organizational culture. "While managers are aware of their organization's culture(s), they are often unsure about how to influence it" (Mike & Slocum, Jr., 2003, p. 319). "Unfortunately, scholars have not provided organizations and the managers who run them with the frameworks to handle the pressure for more frequent fundamental change" (Worley & Mohrman, 2014, p. 216).

While culture is considered important within organizations, Plakhotnik and Rocco (2011) found that organizational culture is not a primary research topic within the Academy of Human Resource Development. They proposed two reasons for the lack of attention: "first, organizational culture has been a center of attention and remains a controversy in business and academic literature and practice and, second, organization theory/behavior constitutes a core curriculum content area at more than half of graduate HRD programs in the country" (Plakhotnik & Rocco, 2011, p. 89). This void in organizational culture research poses an academic research opportunity, as well as an opportunity to prepare students in HRD programs.

Definitions

*Action Learning: "*A continuous process of learning and reflection, supported by colleagues, with an intention of getting things done" (McGill & Beaty, 2002, p. 11).

Action Research. A research methodology that "aims to contribute to the practical concerns of people in an immediate problematic situation and to the goals of social science by joint collaboration within a mutually acceptable ethical framework" (Rapoport, 1970, p. 499).

Change Management. A set of basic tools or structures intended to keep any change effort under control, with the goal to minimize the distractions and impacts of the change (Kotter, 1996).

Change Readiness. "A collection of thoughts and intentions toward a specific change" (Bernerth, 2004, p. 39).

Culture. "The collective programming of the mind that distinguishes the members of one group or category of people from others" (Hofstede, Hofstede, & Minkov, 2010, p. 6).

Organizational change. The organization's implementation of a new idea or behavior (Liu & Chen, 2008).

Organizational climate. "The relatively enduring quality of the total [organizational] environment that (a) is experienced by the occupants, (b) influences their behavior, and (c) can be described in terms of the values of a particular set of characteristics (or attributes) of the environment" (Tagiuri & Litwin, 1968, p. 25).

Organizational culture. "(1) a pattern of basic assumptions, (2) intended, discovered, or developed by a given group, (3) as it learns to cope with its problems of external adaptation and internal integration, (4) that has worked well enough to be considered valid and, therefore (5) is to be taught to new members as the (6) correct way to perceive, think, and feel in relation to those problems" (Schein, 1984, p. 7).

Value. "A conception, explicit or implicit, distinctive of an individual or characteristic of a group, of the desirable which influences the selection from available modes, means, and ends of actions" (Kluckhohn, 1951, p. 395).

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Chapter 2: Review of the Literature

The purpose of this action research study was two-fold: (a) to further the organization's on-going culture transformation and (b) to develop employees at a health care organization to better understand organizational culture and change management concepts to support this change and future changes. Because of these two focus areas, the literature review included research on organizational culture and change management.

Organizational Culture Overview

Organizational culture runs broad and deep, covering all areas of life. According to Hofstede (2015), "any group of people that spends time together, of whatever size, forms culture" which means they are creating "shared and transferable perceptions, values, or practices" (p. 546). "Any couple can develop a culture, as can any society of millions, or any social unit of intermediate size such as a company" (Hofstede, 2015, p. 547).

Organizational culture, as a concept, has a fairly recent origin, being used only in the last few decades. "Attributing cultures to organizations first appeared in the 1960s: organizational culture became a synonym for organizational climate" (Hofstede, Hofstede, & Minkov, 2010, p. 343). When the social constructionist view against the rationalist theories of the organization emerged in the 1960s, the focus on formal control systems shifted to informal control systems, of which organizational culture is considered the soul (Petersen & Dobbin, 2006; Zheng, Qu, & Yang, 2009). The equivalent corporate culture gained popularity in the 1980s, with considerable research since that time (Denison, 1996; Hofstede et al., 2010).

The popularity of culture recently piqued, as *culture* was the #1 word of the year for 2014, according to Merriam-Webster. "*Culture* is a big word at back-to-school time each year, but this year lookups extended beyond the academic calendar. The term conveys a kind of academic attention to systematic behavior and allows us to identify and isolate an idea, issue, or group: we speak of a 'culture of transparency' or 'consumer culture.' *Culture* can be either very broad (as in 'celebrity culture' or 'winning culture') or very specific (as in 'test-prep culture' or 'marching band culture'). During 2014, the use of the word *culture* to define ideas in this way moved from the classroom syllabus to the conversation at large, appearing in headlines and analyses across a wide swath of topics" (Merriam Webster, 2014).

Organizational culture serves a number of functions. "It creates a distinction between one organization and another, it provides a sense of identity for organizational members, it generates a commitment to the larger team or organizational unit and it is the social glue that holds the organization together by providing cues for what employees should say and do" (Simpson & Cacioppe, 2001, p. 396). Several scholars postulated that culture provides a shared understanding of organizational values and beliefs that is helpful when rules fail to regulate behaviors (Slater & Narver, 1995; Zheng, Qu, & Yang, 2009). Furthermore, "organizational culture serves as a common frame of reference that enables employees to better interpret organizational activities, understand their supervisors' and peers' expectations, respond appropriately in new situations, deal with disagreements, or resolve conflicts" (DeSimone, Werner, & Harris, 2002; O'Reilly, 1989; Plakhotnik & Rocco, 2011, p. 76). In essence, organizational culture may be viewed as a soft, holistic concept with presumed hard consequences (Hofstede, et al., 2010).

Culture refers to shared, deeply held values and norms, which are formed through a process of socialization and based on historic events. “Values are an attribute of both individuals and collectivities; culture presupposes a collectivity” (Hofstede, 1981, p. 19). Values are crucial, as employees within an organization learn to perform, thrive, or survive according to the organizational values and norms. According to Hofstede (1994), employees “have to adapt their personal values to the organization’s needs, to a limited extent only” (p. 9). This occurs because “organizational cultures are acquired when we enter a work organization as young or not-so-young adults, by which time our values are firmly in place” (Minkov & Hofstede, 2011, p. 14). Furthermore, Hofstede (2015) noted the importance of how we acquire organizational culture, because “we learn culture by observation, imitation, reward and punishment, not by reading company values leaflets. Each day in everyone’s life is filled with acculturation events” (p. 548).

Many factors and organizational processes may shape organizational culture, including goal setting, training and development, compensation and rewards, and espoused values. As the organizational culture is established, it reflects the groups’ values; however, the cultural norms are often not easy to identify. Researchers noted that these norms are passed on to new employees and applied to new situations (Beckhard & Pritchard, 1992; Cameron & Quinn, 2006; Schein, 1999, 2004). These cultural or behavioral norms tell employees how to behave, make decisions, and approach tasks in a way that allows them to fit in the organization. While organizational culture helps create commitment and a sense of identity, it can, unfortunately, be a liability “when the shared values are not in agreement with what is needed to enhance organizational effectiveness” (Simpson & Cacioppe, 2001, p. 396).

Definitions of Organizational Culture

The word “culture” is derived from the Latin root “colere,” which means to inhabit, to cultivate, or to honor, usually referring to human activity. “Anthropologists define culture as the universal human capacity to classify experiences, to encode and communicate them symbolically through artifacts and behavior” (Kimball, 2005, p. 3).

Organizational culture is defined in numerous ways and informed by many perspectives. “Unlike organizational structure, which is easy to draw and describe, organizational culture is less tangible and more difficult to analyze or define” (Kimball, 2005, p. 3). Schein (1990) noted that “the problem of defining organizational culture derives from the fact that the concept of organization is itself ambiguous” (Schein, 1990, p. 111). Due to its abstract nature, there is not one standard, agreed-upon definition of organizational culture (Plakhotnik & Rocco, 2011; Taormina, 2008). Verbeke, Volgering, & Hessels (1998) found 54 definitions of organizational culture. While there is not one common definition, most definitions focus on shared values, beliefs, behavioral norms, and artifacts within organizations (Cook & Rousseau, 1988; Sathe, 1983; Schein, 1985).

“The most cited cultural researcher, Schein (1979, 1983, 1984, 1993, 1996, 1997), takes a psycho-dynamic view in which culture is seen as an unconscious phenomenon, and the source of the most basic humans assumptions and beliefs shared by organization members” (Graetz & Smith, 2010, p. 145). As one of the leading scholars on the topic of organizational culture, Schein (1984) defined organizational culture as “(1) a pattern of basic assumptions, (2) intended, discovered, or developed by a given group, (3) as it learns to cope with its problems of external adaptation and internal integration, (4) that has worked well enough to be considered valid and, therefore (5) is to be taught to new members as the (6) correct way to perceive, think, and feel in relation to those problems" (p. 7).

Schein (1983) noted that organizational culture "is one of shared solutions to problems which work well enough to begin to be taken for granted – to the point where they drop out of awareness, become unconscious assumptions, and are taught to new members as a reality and as the correct way to view things" (p. 15). Schein continued his research and simplified his organizational culture definition to be the "basic assumptions and beliefs that are shared by members of an organization" (1985, p. 6). With further research, Schein (1999) noted that organizational culture was comprised of "jointly learned values, beliefs, and assumptions that become shared and taken for granted as the organization continues to become successful" (p. 20). Culture may be viewed as what a group learns over a period of time during problem solving, which is simultaneously a behavioral, cognitive, and emotional process. "Extrapolating further from a functionalist anthropological view, the deepest level of culture will be the cognitive in that the perceptions, language, and thought processes that a group comes to share will be the ultimate causal determinant of feelings, attitudes, espoused values, and overt behavior" (Schein, 1990, p. 111).

"Once a group has learned to hold common assumptions, the resulting automatic patterns of perceiving, thinking, feeling, and behaving provide meaning, stability, and comfort; the anxiety that results from the inability to understand or predict events happening around the group is reduced by the shared learning" (Schein, 1990, p. 111). In essence, Schein noted that organizational culture could be defined, observed, and changed to ultimately enhance organizational performance.

Deal and Kennedy (1982) defined culture as "a cohesion of values, myths, heroes, and symbols that has come to mean a great deal to the people" of an organization (p. 4). They noted that organizational culture is comprised of "integrated patterns of human behavior," with observable artifacts that explain the uniqueness of each organization. Deal and Kennedy (1982) further purported that organizations with strong cultures "communicate exactly how they want their employees to behave" and even provide instructions on how to accomplish goals (p. 59).

Hofstede, Hofstede, and Minkov (2010) defined organizational culture as "the collective programming of the mind that distinguishes the members of one organization from others" (p. 345). They noted that an organization's culture is maintained in the minds of both its employees or members and other stakeholders who interact with the organization, including customers, suppliers, labor organizations, neighbors, authorities, and the press.

Other definitions of organizational culture included: "shared systems of meaning" (Howard-Grenville, 2006, p. 49); "the pattern of shared values and beliefs that help individuals understand organizational functioning and thus provide them norms for behavior in the organization" (Deshpande & Webster, 1989, p. 4); "system of shared behaviors" (Yin-Cheong, 1989, p. 129); "individual's interactions and systems" (Walsh, 2004, p. 304); and "an evolved capacity for adaptation at group level," noting that every group forms culture (Hofstede, 2015, p. 548). "Culture, in whatever species, is a system of shared values, rules, norms and institutions, most of them unconscious and unwritten, socially transmitted, regulating the social life of groups" (Hofstede, 2015, p. 548).

Schein (2015) noted that "culture appears to be a popular concept because it does capture the whole of a system, but it will be some time before we have a common set of definitions and insights into what it means to describe and work with such a holistic definition" (p. 10). Furthermore, according to Schein (2015), " interventions claiming to effect culture change are very popular in OD right now, but many of them are not really changing culture at all if we adhere to the more anthropologically correct holistic definition" (p. 10).

When looking at these different definitions of organizational culture, "probably the most basic distinction among writers on organizational cultures exists between those who see culture as something an organization has and those who see it as something an organization is" (Hofstede, Hofstede, & Minkov, 2010, p. 346). Those who see culture as something an organizational has use an analytic approach, with the opportunity to change it. Those who see culture as something an organization is supports a more "synthetic approach and is the opportunity for deeper understanding and "is found almost exclusively among academics" (Hofstede et al., 2010, p. 346).

When defining organizational culture, it is important to understand the term "organizational climate" because these terms are often interchangeably used. "Both concepts share features of complexity and multidimensionality (Pettigrew, 1990), have been linked to organizational outcomes, and started to emerge within comparable time frames (Sleutel, 2000)" (Jung et al., 2009, p. 1088). While organizational climate and organizational culture were at one time distinguished because of the research method used (climate used a quantitative approach, and culture used a qualitative approach), Denison (1990) noted that the two concepts are virtually indistinguishable.

There are commonalities of the two concepts; however, they originated from different domains. Culture is a more encompassing, global concept; climate has roots from meteorology and psychology, so is considered an index rather than a causative factor in organizations (Glendon & Stanton, 2000; Jung, et al., 2009; Meudell & Gadd, 1994; Parker et al., 2003; Sleutel, 2000).

Organizational climate is the shared perceptions of the formal and informal organizational policies, practices, and procedures (Schnieder & Reichers, 1983). The climate is "embedded in the physical look of the place, the emotionality exhibited by employees upon entry, and myriad other artifacts that are seen, heard, and felt" (Schein, 2000, p. xxiv). The bottom line is that climate is how the organization's culture makes the organization feel. Ultimately, the culture must change first in order for the climate to change.

Plakhotnik and Rocco (2011) studied 59 manuscripts published in the Academy of Human Resource Development Proceedings from 1994 to 2009. They found that most (83%) defined culture in terms of "shared values, assumptions, behaviors, learning culture, and other culture" (Plakhotnik & Rocco, 2011, p. 82). Their analysis of the definitions of organization culture found two different perspectives – organization-wide culture and subcultures within an organization-wide culture (Plakhotnik & Rocco, 2011). Schein (2015) supported these two perspectives, positing that while culture is popular because it captures the "whole of the system," it should be noted that parts of organizations may have distinct subcultures.

Subcultures

Organizational subcultures often exist within organizations and at times appear so fragmented that some consensus is difficult to establish (Van Maanen & Barley, 1995). Schein (1990) noted that "any definable group with a shared history can have a culture and that within an organization there can therefore be many subcultures" (p. 111). A subculture is comprised of "distinct clusters of understandings, behaviors, and cultural forms that identify groups of people in the organization" (Trice & Morand, 1991, p. 1). According to Lok, Westwood, and Crawford (2005), subcultures refer to a more immediate work context in which specific values and attitudes are formed and routinely reinforced.

Subcultures can be very powerful, as they may also impact both an organization's ability to change, and therefore, an organization's overall effectiveness (Deem, DeLotell, & Kelly, 2015, p. 565). A subculture may be viewed as counterculture when one or more groups think the corporate culture is not being practiced or because the corporate culture values are not in alignment with their core values (Braga Rodrigues, 2006; Gagliardi, 1986). Subcultures may reinforce, be independent of, or conflict with the organizational culture and other subcultures. Subcultures are often formed within smaller groups that have similar interests and provide commonality for people to connect with one another in a way that is more focused than the organizational culture. According to Schein (1993), "the subunits of organizations are more and more likely to develop their own subcultures (implying different languages and different assumptions about reality, i.e., different mental models) because of their shared core technologies and their different learning experiences" (p. 41). These subcultures may develop to "mediate and protest the interests of their members" (Braga Rodrigues, 2006, p. 538). Furthermore, Schein (1996) identified three common organizational subcultures that may have differing assumptions from either internal practices or from an external professional field – operational, technical, and management employees.

"If subcultures are not equally powerful, divergent interpretations will be channeled into actions that are broadly consistent with the strategies for action of the dominant subculture" (Howard-Grenville, 2006, p. 68). Focusing on the subcultures can be more important than simply paying attention to the overall organizational culture because the attitudes and beliefs of the employees can be more decisively determined at that level (Howard-Grenville, 2006).

Schein (1993) noted that each small group or unit "creates common frames of reference, common languages, and ultimately common assumptions – thus forming genuine subcultures that will have to be integrated if the organization is to work effectively" (p. 42). To enable culture change, Hofstede (1994) and Lofquist (2011) emphasized the need to consider subcultures within organizations, as these subcultures have different requirements and expectations, which drive the need for different approaches.

Levels of Culture

Organizational culture is complex, requiring considerable study and analysis. "Though the field of organizational culture studies is both diverse and divergent, organizational culture studies generally view humans as sense-making creatures, concerned with developing persuasive interpretations of what happens to them, reflecting on the past and imagining the future according to patterns provided by cultural systems"

(Greenwood, 2015, p. 202). Every organization is compiled of individuals who carry patterns of thinking, feeling, and potential acting that were learned throughout a person's lifetime (Hofstede, Hofstede, & Minkov, 2010). The development of these patterns starts within the family, then is influenced by the neighborhood, school, youth groups, the community, and the workplace. According to Hofstede et. al. (2010), "it is the collective programming of the mind that distinguishes the members of one group or category of people from others" (p. 6). Ultimately "culture is learned, not innate" (Hofstede et al., 2010, p. 6).

While organizational culture is highly complex, it can be categorized into different levels to make it easier to understand. For example, Schein (1990) distinguished three fundamental levels at which culture manifests itself: (a) observable artifacts, (b) values, and (c) basic underlying assumptions. Hofstede, Hofstede, & Minkov (2010) noted that "cultural differences manifest themselves in several ways; the following four together cover the total concept rather neatly: symbols, heroes, rituals, and values" (p. 7). The following information combines the fundamental levels noted by Schein (1990) and Hofstede et al. (2010).

Observable Artifacts, Symbols, Heroes, and Rituals. Observable artifacts are the organization's visible items, including the organization's structure and processes. "This category includes everything from the physical layout, the dress code, the manner in which people address each other, the smell and feel of the place, its emotional intensity, and other phenomena, to the more permanent archival manifestations such as company records, products, statements of philosophy, and annual reports" (Schein, 1990, p. 111).

Observable cultural artifacts are particularly important in the workplace, as they "are those sets of attributes - objects and behaviors – that help definitively characterize one organization as opposed to another" (Higgins & McAllaster, 2004, p. 64). Furthermore, cultural artifacts add value by playing a critical role in changing organizational behavior to support a change in the organizational strategy (Higgins, McAllaster, Certo, & Gilbert, 2006). Cultural artifacts are also effective in reinforcing values and practices that have been used for a long period of time (Higgins et al., 2006).

Because of the value of these observable cultural artifacts, "changing cultural artifacts is not a luxury but a necessity for the successful execution of strategy" (Higgins & McAllaster, 2004, p. 67-68). To better understand the different types of cultural artifacts, Schein (1990) categorized artifacts into three aspects: the physical aspects such as the company logos or the physical space, the behavioral aspects including organizational rituals, and the organizational aspects including anecdotes, stories, and heroes.

One specific physical aspect may be office design, which physically expresses underlying organizational values and norms and creates a particular feeling and meaning for employees (Elsbach & Bechky, 2007). Furthermore, "as the visible part of an organization's culture, office design and décor symbolize an organization's social order" (Hogan & Coote, 2014, p. 1613). Higgins & McAllaster (2004) observed that "the physical surroundings, characterizing the particular culture, including its facilities, equipment, and interior and exterior design and decoration – play a major role in defining an organization's culture" (p. 67).

Behavioral aspects include organizational rituals or practices. “Practices are the visible part of cultures. New practices can be learned throughout one’s lifetime” (Hofstede, Hofstede, & Minkov, 2010, p. 19). Rituals provide guidelines and social maps, so are viewed as helpful in managing behavior in accordance with value-based expectations (Beyer & Trice, 1987; Hogan & Coote, 2014). Organizational rituals demonstrate through public recognition that employees’ accomplishments are valued and expected; additionally, these rituals serve to motivate other employees (Hogan & Coote, 2014; Trice & Beyer, 1984). Through the use of rituals, organizations can start to realize the practical consequences of rewarding desired behaviors so that other employees repeat these behaviors (Barnes, Jackson, Hutt, & Kumar, 2006; Hofstede et al., 2010; Hogan & Coote, 2014).

Organizational aspects include symbols which may be “words, gestures, pictures, or objects that carry a particular meaning that is recognized as such only by those who are the culture” (Hofstede et al., 2010, p. 8). Additional organizational aspects include the employees, particularly the organization’s heroes, which are “persons, alive or dead, real or imaginary, who possess characteristics that are highly prized in a culture and thus serve as models for behavior” (Hofstede et al., 2010, p. 8).

Due to the power and impact of cultural artifacts, failing to remove or modify the old artifacts with the desired new artifacts may result in the failure of a change initiative (Higgins & McAllaster, 2004). “It is because an organization’s culture (its values, norms, and practices) and its strategy are so very interdependent that using cultural artifacts to reinforce a culture or modify it to align with strategy is so effective” (Higgins et al., 2006, p. 398).

Values. Organizations often create formal value statements that specifically identify core values. The core values are the organization's goals, strategies, and philosophies that the organization advocates about itself and "are also reflected in an organization's strategy, structure, systems and processes, leadership style, staffing, and resources; and in its rules, policies and procedures" (Higgins & McAllaster, 2004, p. 69). These are often well known within organizations considered to have strong cultures and "public companies have been making their own culture, and concepts of vision, mission and values a regular part of their literature" (Ortega-Parra & Sastre-Castillo, 2013, p. 1071). "Through interviews, questionnaires, or survey instruments one can study a culture's espoused and documented values, norms, ideologies, charters, and philosophies" (Schein, 1990, p. 112).

Hofstede (2001) noted that national and organizational cultures differ in two dimensions -values and practices. Values are established in early youth, while practices are acquired through experience and workplace socialization. "Values serve an important function guiding specific norms, or expectations of behavior, within organizations" (Hogan & Coote, 2014, p. 1611). Behavior that reinforces these organizational values and norms can be seen in what is rewarded, and what is not (Higgins & McAllaster, 2004). "Values and norms can, in turn, manifest into artifacts (e.g., organizational rituals, language and stories, and physical configurations) and lead to desired behaviors such as innovation" (Hogan & Coote, 2014, p. 1613).

The intrinsic worth of values is to serve as social principles of philosophies to guide behaviors and set a framework for organizational routines and practices (Hatch, 1993; O'Reilly, Chatman, & Caldwell, 1991). Values, therefore, provide a subtle way that senior management can exercise influence (Hogan & Coote, 2014; Mumford, Scott, Gaddis, & Strange, 2002).

One aspect to consider is how individual values align with organizational values. "Individual values are described as strongly held and enduring preferences of the way things ought to be while organizational values are norms that specify how organizational members should behave and how organizational resources should be allocated" (Edwards & Cable, 2009, p. 655). The degree to which individuals' values align with organizational values has been widely accepted as one key to a quality fit between employee and employer (Godrich, 2010; Zeitlin, Augsberger, Auerbach, & McGowan, 2014). Higher congruency is also related to increased job satisfaction, greater motivation, increased employee identification with the organization, and reduced intent to leave (Edwards & Cable, 2009; Godrich, 2010; Zeitlin, Augsberger, Auerbach, & McGowan, 2014). However, "most organizations acquire members in adulthood and hardly affect their deep values. What they can affect is the status held by the group members" (Hofstede, 2015, p. 558).

Basic Underlying Assumptions. The assumptions of organizations can be the most difficult to diagnose, as that is where the unconscious, taken-for-granted beliefs, thoughts, and feelings exist. "Through more intensive observation, through more focused questions, and through involving motivated members of the group in intensive self-analysis, one can seek out and decipher the taken-for-granted, underlying, and usually unconscious assumptions that determine perceptions, thought processes, feelings, and behavior" (Schein, 1990, p. 112). Schein (1999) noted that the deepest level of culture is based on the underlying assumptions that are unconscious, ultimately leading to individuals' actions. Schein (1999) expressed the depth and complexity of culture by noting that: "the main lesson to learn . . . is that culture is deep, extensive, and complex. It covers all aspects of reality and human functioning. It influences how you think and feel as well as how you act, and it provides meaning and predictability in your daily life. So don't take it lightly, and don't think glibly about changing it" (p. 58).

Basic underlying assumptions are powerful because "creating shared rules, even if they are never written down, is a precondition for group survival" (Hofstede et al., 2010, p. 12). Furthermore, several researchers suggested that surfacing implicit cultural assumptions is crucial to successfully achieve the difficult task of culture change (Bedingham, 2001; Heracleous & Langham, 1996; Spicer, 2011).

History of Organizational Culture

The concept of organizational culture originates in cultural anthropology and is popular within organizational behavior, management, and marketing literature (Gregory, Harris, Armenakis, & Shook, 2009; Homburg & Pflesser, 2000; Schein, 1992). While the concept of organizational culture is rooted in cultural anthropology, it has a fairly recent origin. According to Linnenluecke and Griffiths (2010, p. 358), "the concept of organizational culture first emerged in the 1970s and 1980s (e.g., Hofstede, 1981; Ouchi & Price, 1993; Pettigrew, 1979; Schwartz & Davis, 1981) and soon became one of the most influential but also most controversial concepts in management research and practice (Crane, 1995; Jarnagin & Sloum, 2007)." Plakhotnick & Rocco (2011) noted that the concept has been around for only about 40 years, when in the 1980s, researchers became interested in Japan's phenomenal business success, while the United States experienced a decrease in production. While the concept is relatively new, the foundation and connection to anthropology, sociology, social psychology, and organizational behavior have older origins (Schein, 1990).

Research topics with older origins are noteworthy as foundational to organizational culture. The concept of "group norms" was heavily documented in the Hawthorne studies of the 1920s. Social psychologists during the 1940s used the concept of the "cultural island" to describe a training setting that was different from the trainees' setting (Schein, 1990). During the 1950s and 1960s, organizational psychology began to differentiate itself from industrial psychology by focusing on teams and organizations, rather than on individuals (Bass, 1965; Schein, 1965, 1990).

Katz and Kahn (1966) laid important theoretical foundation for the concept of organizational culture, as they focused their analysis on systems theory and systems dynamics. Additionally, the field of organizational psychology grew considerably with the growth and creation of business and management schools. "As concerns with understanding organizations and interorganizational relationships grew, concepts from sociology and anthropology began to influence the field" (Schein, 1990, p. 110).

During the 1980s, the thrust that catapulted the concept of culture into the forefront was trying to explain why U.S. companies did not perform as well as some of their counterpart companies in other societies, notably Japan, during the 1980s. Because of this interest to explain U.S. companies' performance, culture studies started to emerge in the early 1980s as a reaction to the numerous quantitative climate studies (Denison, 1996).

In addition to these culture studies, three best-selling books in the early 1980s drove the focus and attention on organizational culture. Ouchi (1981), in "Theory *Z*" suggested that successful Japanese companies valued its employees, providing a supportive environment that helped build productivity. Peters and Waterman (1982) studied over 60 U.S. organizations, identifying market-oriented culture as the important key to being successful. Deal and Kennedy (1982) made the term “corporate culture” popular in its book entitled “Corporate Cultures: The Rites and Rituals of Corporate Life.” They noted that successful companies carefully build their cultures, as culture is “a powerful lever for guiding behavior” (Deal & Kennedy, 1982, p. 15).

Denison (1984) conducted one of the first research studies to test organizational culture, suggesting that culture is reflected in employee involvement, consistent performance, adaptability, and acceptance of mission. His study used survey data and Standard and Poor’s financial ratios to compare a set of 34 large American firms to test the relationship between corporate culture and performance, finding that organizational culture and behavioral aspects are linked to short-term performance and long-term survival.

Since these popular studies were published over three decades ago, the concept of organizational culture has been routine within academia and organizations. Peters and Waterman’s (1982) best seller specifically drove organizations to focus on culture for practical purposes, while Weeks (2004) noted that corporate cultures are often part of mission statements.

Organizational Culture Models

There are numerous models of organizational culture. Two models most frequently noted in the research are the Competing Values Framework (CVF) (Cameron & Quinn, 1999) and the Denison Culture and Effectiveness Model (1997). Cameron &

Quinn (1999) noted that due to organizational culture being so expansive, it was difficult to identify all the factors that have an impact on organizational culture. However, they developed the CVF, which they considered "a theoretical foundation, that can narrow and focus the search for key cultural dimensions" (Cameron & Quinn, 1999, p. 29). This framework identified whether an organization has a predominant internal or external focus and whether it strives for flexibility and individuality or stability and control. These dimensions create four quadrants representing distinct culture types: (a) Clan – environment is best managed through teamwork; (b) Adhocracy – organizational success is dependent on innovation; (c) Hierarchy – culture is built on the importance of structure and stability; and (d) Market – focus is on goal attainment and competition. Cameron and Quinn developed an Organizational Culture Assessment Instrument to determine organizational culture profiles, with results falling into one of the four quadrants. They determined that more effective organizations reflect elements of each of the four types, and that culture congruence across the organization was key for organizational effectiveness. "Matches between the dominant culture of the organization and its leadership styles, management roles, human resource management, quality management and effectiveness criteria contribute to higher levels of effectiveness" (Cameron & Quinn, 1999, p. 54).

The Denison Culture and Effectiveness Model (1997) described organizational culture as four traits related to organizational effectiveness. Similar to the continuums of the CVF, the four traits included: (a) Involvement – organizations encouraging employee participation; (b) Consistency – the degree to which artifacts, values, and basic assumptions are internalized and shared; (c) Adaptability – an organization's ability to respond to changes in internal and external environments; and (d) Mission – an organization with a clearly defined, shared mission (Denison, 1997).

Strength of Cultures

Deal & Kennedy (1982) asserted that a "strong culture has almost always been the driving force behind continuing success in American business" (p. 5). According to numerous researchers, a strong organizational culture consists of two important characteristics: (1) the ability to influence and motivate employees to behave in a way supported by the organization and (2) a crystallization of the importance of the system of organizational values (Barnes et al., 2006; O'Reilly, 1989; O'Reilly, Chatman, & Caldwell, 1991; Schneider, 2000; Wiener, 1988).

Theorists (e.g., Schein, 1984; Trice & Beyer, 1993) proposed that culture strength is a multidimensional construct "that is shaped by the strength of the organizational value systems and by selected cultural dimensions that anchor and reinforce these shared values" (Barnes et al., 2006, p. 257). Furthermore, researchers noted that employees in strong cultures identify with and act on their organizational values (Deal & Kennedy, 1982; Kilmann, Saxton, & Serpa; 1986; Ouchi, 1981). Barnes et al. (2006) asserted that culture strength is "defined by the strength of organizational values and by five cultural dimensions that anchor and reinforce these values – stories, heroes, rituals, ceremonies, and the cultural network" (p. 257).

Culture as Competitive Advantage

Schein (1992) considered organizational culture as a social force that is largely invisible, yet very powerful. Empirical evidence suggested that organizational culture significantly influences market-oriented behaviors, and market and financial performance

(Homburg & Pflesser, 2000), employee attitudes and organizational effectiveness (Gregory et al., 2009), and has a greater contribution to knowledge management and organizational effectiveness than organizational strategy and structure (Zheng, Yang, & McLean, 2010). Researchers (Hogan & Coote, 2014; O'Reilly, Chatman, & Caldwell, 1991) noted that an organization's culture has a strong influence on employees' behaviors, well beyond the impact of formal control systems, procedures, and authority. Tabaghdehi and Salehi (2015) posited that "the impact of organizational culture on employees is so high that we can realize the behaviors, feelings, views and attitudes of its members by monitoring the culture existed between them and evaluate and predict their possible reactions toward what's happening" (p. 352).

Considerable research noted that a firm's cultural resources can create a competitive advantage, as cultures are difficult to imitate due to the complex set of social processes that comprise culture (Fiol, 1991; Reed & DeFillippi, 1990). Furthermore, "a company's culture differentiates it from other companies and helps explain why employees are attracted to one employer versus other employers" (Smith, 2003, p. 249).

During the 1980s, Barney was instrumental in researching the concept of competitive advantage, noting that leadership was important in developing and maintaining organizational culture, but that operating culture (employees' day-to-day activities) ultimately provided the competitive advantage (Barney, 1986). Barney's (1991) resource-based view focused on a firm's strengths and weaknesses, rather than a firm's opportunities and threats, to create competitive advantage. Barney (1991) proposed that competitive advantage can be gained if resources help confront threats, are rare in the competitive marketplace, and cannot be replicated by competitors.

Intangible resources are more likely to create a competitive advantage because these resources possess characteristics of being rare and difficult to imitate (Barney, 1986; Prahalad & Hamal, 1990). Organizational culture includes non-patentable resources such as reputation, trust, friendship, and teamwork, which are difficult to duplicate. Socially complex resources, including culture, can be considered the most unique of all and, therefore, are difficult to imitate.

Peters and Waterman (1982) noted that the dominance of culture proved to be essential to excellent companies. They posited that the stronger the culture and the more focused on the marketplace, the less the need for organization charts, policy manuals, and detailed procedures. In these strong companies, all employees knew what they should do in most situations because guiding values were clear. Organizational culture can affect large-scale change efforts in two distinctly different ways:

1) Culture can be a primary source of resistance to change if existing beliefs and practices are not aligned with the goals and
2) Culture can be an important strategic lever to drive the change effort when aligned with the goals (Heckelman, Unger, & Garofano, 2013).

Pfeffer (1995) purported that human resources are the key to strong business performance, as factors such as product and process technologies no longer drive competitive advantage. "Human capital is the most significant asset of an organization and a source of creativity and innovation that includes all individuals' and managers' capacities, talents, knowledge and experience in an organization" (Tabaghdehi & Salehi, 2015, p. 351). Furthermore, an organization's intellectual capital includes the human capital, structural capital and relationship capital, which interact to ultimately result in the organization's competitive success (Borne Mann & Alert, 2007; Tabaghdehi & Salehi, 2015). The best way to create this sustained competitive advantage and competitive success is to incent employees to acquire skills, collaborate, and provide high quality (Pfeffer, 1995).

Culture's Impact on Performance

"In recent decades, there has been much research on the concept of corporate culture, and especially its relationship with organizational performance" (Ortega-Parra & Sastre-Castillo, 2013, p. 1071). The hypothesis that cultural strength improves financial performance "is based on the presumption that there are performance benefits from a strong corporate culture due to enhanced coordination and control as well as increased motivation and goal alignment among organizational members (e.g., Deal & Kennedy, 1982; Ouchi & Price, 1993; Peters & Waterman, 1982; Sorensen, 2002)" (Linnenluecke & Griffiths, 2010, p 362). However, the research regarding the impact of organizational culture on performance has varying results. For example, study results range from no association between culture and objective firm performance (Gordon, 1985; Sorensen, 2002) to mixed results (Christensen & Gordon, 1999) to positive findings in specific situations (Berson, Oreg, & Dvit, 2008; Cameron & Quinn, 2006; Kotter & Heskett, 1992; Peterson, Smith, Martorana, & Owens, 2003).

Several researchers suggested that one of the factors influencing firm performance is its organizational culture (Cameron & Quinn, 2006; Duke II & Edet, 2012; Fekete & Bocskei, 2011; Peters & Waterman, 1982; Saffold, 1988; Zheng, Yang, & McLean, 2010). Multiple theories have been established to explain how organizational culture influences organizational performance: Ouchi and Jaeger's (1977) Theory Z, Deal and

Kennedy's (1982) culture model, Peters and Waterman's (1982) strong culture, Cameron and Quinn's (1999) four cultural types (hierarchy, clan, market, and adhocracy), and Denison and his colleagues' (Denison, 1990; Denison & Mishra, 1995; Denison & Neale, 1996; Fey & Denison, 2003) four functional dimensions of organizational culture (adaptability, consistency, involvement, and mission) that are positively related to organizational effectiveness across different national cultures.

Many researchers recognized that organizational culture affected performance and the quality of customer service (Cummings & Worley, 1997; Denison, 1984, 1990; Gordon, 1985; Kotter & Heskett, 1992; Simpson & Cacioppe, 2001). For example, Denison's study of 34 large American firms indicated "that companies with a participative culture reap a return on investment (ROI) that averages nearly twice as high as those in firms with less efficient cultures" (Denison, 1984, p. 6). This data provided the first evidence that organizational culture and behaviors were linked to short-term performance and long-term survival.

In a study of over 200 companies, Kotter and Heskett (1992) researched the relationship between the strength of organizational culture and economic performance. They found that "corporate culture can have a significant impact on a firm's long-term economic performance" (Kotter & Heskett, 1992, p. 11). However, they noted that a strong culture was significantly related to performance only when "the resulting actions fit an intelligent business strategy for the specific environment in which the first operates" (Kotter & Heskett, 1992, p. 142). They purported that culture creates an environment that influences an organization's capacity to exploit or hinder product and market opportunities. Kotter and Heskett's (1992) research of over 200 companies resulted in four specific research findings: (a) organizational culture can have a significant impact on long-term economic performance; (b) organizational culture will be even more important in driving success or failure; (c) cultures that inhibit strong long-term performance are commonplace, even when employees are reasonable and intelligent; and (d) while difficult to change, organizational cultures can be enhanced to drive performance.

Sorensen's (2002) empirical research supported Kotter and Heskett's conclusions that strong cultures improve organizational performance, specifically noting the importance of alignment with organizational strategy and norms that promote flexibility and change with environmental conditions. According to Schein (1999), there was "abundant evidence that corporate culture makes a difference to corporate performance" (p. xiv). Cameron and Quinn (2006) agreed with Schein's findings, noting that "organizational culture has a powerful effect on the performance and long-term effectiveness of organizations" (p. 5). Furthermore, the study conducted by Yesil and Kaya (2013) took this further, supporting several empirical studies that proved the indirect effect of organizational culture on performance (Han, Kim, & Srivasta, 1998; Tseng, 2010; Zheng, Yang, & McLean, 2010).

Deem, DeLotell, and Kelly (2015) studied part-time (PT) and full-time (FT) faculty in higher education, supporting "the link between organizational culture and organizational effectiveness in higher education" (p. 577). More specifically, their research showed that "PT faculty do not appear to impact culture in a manner sufficient to impact organizational culture and thereby overall organizational effectiveness thus strengthening the case for the use of PT faculty" (p. 577).

Researchers provided evidence that organizational culture is positively associated with employee attitudes and the subjective assessment of performance (Besrukova, 2012; Denison & Mishra, 1995); however, there is little evidence linking organizational culture to objective organizational outcomes (O'Reilly, Caldwell, Chatman, & Doerr, 2014). O'Reilly et al. (2014) noted three reasons for this lack of clarity: (a) designing studies and obtaining data that allow for the assessment of culture across organizations has been a daunting task, often resulting in studies with low samples; (b) disagreements about the definition and measurement of culture and performance, resulting in different frameworks and metrics; and (c) an evaluation in understanding the form that this relationship might take, ranging from a simple direct association to contingent relationships related to firm strategy and environmental conditions.

Numerous researchers supported the viewpoint that there is no clear relationship between organizational culture and performance (Gregory et al., 2009). Siehl and Martin (1990) warned that "it is unwise and misleading to justify studying culture in terms of its links to financial performance, since that link has not been – and may well never be – empirically established" (p. 242). Siehl and Martin specifically noted that the most that culture research can do is to establish relationships between culture and psychological and behavioral outcomes. Further research conducted by Wilderom, Glunk, and Maslowski (2000) supported Siehl and Martin's research, questioning the link between culture and performance. Subsequent research by Hartnell, Yi Ou, and Kinicki (2011) found significant correlations between culture and employee job satisfaction, but discovered mixed results for culture and subjective ratings of organizational processes and performance, with few studies researching performance indicators and culture.

Different organizational cultures were found to be differentially related to firms' outcomes (O'Reilly et al., 2014). For example, "more innovative cultures had higher sales growth, more bureaucratic cultures were more efficient, and more supportive cultures had higher levels of employee satisfaction but lower sales growth" (O'Reilly et al., 2014).

While previous studies of culture and objective firm performance yielded mixed results, O'Reilly et al. (2014) found clear associations between organizational culture and performance in terms of financial performance, market valuation, analysts' recommendations, reputation, and attitudes among employees. "The results also show that cultures that emphasize adaptability and detail orientation are significantly associated with higher ratings from Fortune's Most Admired list, are given positive evaluations by employees, have a higher market-to-book value, and are evaluated more positively by stock analysts" (O'Reilly et al., 2014, p. 617). The idea that cultural dimensions may be positively related to some outcomes and negatively related to others may explain the mixed results regarding the connection of organizational culture and performance.

Culture Shifts or Changes

Culture may be considered an outgrowth of the social interactions that are organizations (Trice & Beyer, 1993). This is because culture "refers to the deep structure of an organization, which is rooted in the values, beliefs, and assumptions held by organizational members" (Denison, 1996, p. 624). Schein (1985) noted that as culture is deeply embedded in an organization, culture can be viewed as a cause, rather than an effect, because culture influences strategy, structure, and procedures.

Cultures are never static (Greenwood, 2015; Kotter & Heskett, 1992). Rather, culture evolves over time and becomes a pervasive force and its systemic impacts underlay much of the organization's practices. Culture is a dynamic system in a natural state of movement in which there is continued shuffle, selection, variation, and retention of culture components that are shaped by the organization's adaptations to its environment (Weeks & Galunic, 2003; Zheng, Qu, & Yang, 2009). "A dynamic culture should change as the organization changes, restructures, is merged with other institutions, responds to environmental shifts, adds new members, or loses others" (Ribando & Evans, 2015, p. 102).

Organizational culture may evolve or shift in different ways. Researchers Yin et al. (2014) noted two different views on organizational culture evolution: (1) the integration view which treats internal values and beliefs as key elements to organizational culture change (Barkow, Cosmides, & Toody, 1995; Hall, 1959) and (2) the differentiation view which treats institutional orders and meanings as key elements in organizational culture change (Meyerson & Martin, 1987). The integration view treats culture as a system concept within an organization that should be carefully engineered or controlled by top management, while the differentiation view treats organizational culture as an open, dynamic system that changes often with no planning or control by top management.

Martin (1992, 2002) identified three categories of culture: (a) "integrated" when it reflects a wide consensus of the organization, (b) "differentiated" when it is confined to some subcultures in opposition to others; and (c) "fragmented" when there is little consensus across the organization. The need for organizations to change their culture occurs when its environment shifts and the old norms considered part of their successes may no longer be effective (Cameron & Quinn, 2006). Because of the ingrained nature of organizational culture, a person may question how it occurs.

Schein's (2004) research suggested that crises create new norms, thus driving the culture change. These crises usually cause anxiety, and people are more open to shift their thinking to help reduce the anxiety. Schein (2004) noted that there must be "some sense of threat, crisis, or dissatisfaction . . . before enough motivation is present to start the process of unlearning and relearning" (p. 324). Schein (2000), however, warned that "management should seek not to change culture, but to change effectiveness. Only if it can be shown that the culture is actually a constraint should one launch a culture change program" (p. xxix).

While culture evolves over time, managing cultural transformation attracted significant attention among organizational consultants, change scholars, and practitioners during the 1980s. Following their lead, researchers in the 1990s proposed a formulaic approach which pre-supposed that organizational change can and should be controlled in an orderly process, a simple case of unfreezing, moving, and refreezing. Leading research from the 1980s and 1990s proposed principles about sustained, self-generating culture change:

- True behavior change cannot be forced; sustained long-term change only occurs when people's hearts and minds are committed to the change (Senge, 1990);

- People commit themselves when they believe in the value of the change, feel involved, and their personal and organizational values are in alignment (Pedler, 1985);
- Organization-wide systemic changes must occur to support the new cultural norms and values (Morgan, 1986);
- Commitment begins through people's interest and involvement, with the opportunity for people to experiment and reflect in a comfortable, non-threatening environment (Peters & Waterman, 1982);
- The psychological (recognition, self-esteem) rewards and material rewards to change must be greater than maintaining the current situation (Plant, 1987);
- When people are unable or unwilling to deal with the effects of change, they hold on to familiar practices (Bridges, 1980);
- People accept change when they move through a process and deal with any feelings of loss (Bridges, 1980); and
- Effective culture change occurs when worked at three levels: organization, team, and individual (Heckelman, Unger & Garofano, 2013).

Kotter and Heskett (1992) created a five-stage process to successful culture change, completing each stage in a specific sequence before moving on to the next stage. They found that abbreviating stages or skipping stages "never produces a satisfying result" (Kotter & Heskett, 1992, p. 3). Their five-stage process of successful corporate culture change included: 1. Initial Culture; 2. Aberrant Behavior; 3. New Leadership, New Vision; 4. Reorganization; and 5. Successful Culture Change.

Difficulty in Shifting Culture. While the researchers in the 1990s proposed different formulas or processes for organizational change, research demonstrated that it is very difficult to change the culture of a large organization. The difficulty in shifting the culture may be rooted in the concept that "culture change is a long process that requires a shift in employees' attitudes and behaviors" (Plakhotnick & Rocco, 2011, p. 76). "Imposing change means fighting entrenched sets of values and beliefs shared by organizational members" (Graetz & Smith, 2010, p. 145). Hofstede, Hofstede & Minkov (2010) noted that culture change is particularly slow and difficult due to changing these core values. "Deep culture, acquired in infancy, cannot be changed since it resides in unconscious shared values, but the more superficial cultures acquired in adulthood are more conscious, and to some degree amenable to change" (Hofstede, 2015, p. 548).

Furthermore, Kotter and Heskett (1992) noted that culture change is difficult for several reasons: (a) organizations that have been successful continue to be inward-looking and may continue with current values, even though these values may inhibit future performance; (b) senior management does not stay in touch with the needs of their organization, resulting in a lack of support and decisions that impede change efforts; (c) the length of time to accomplish culture change is extensive, ranging from four to ten years – averaging six years; and (d) successful culture change erodes over time, as it is not successfully passed on to new employees.

Research demonstrated the difficulty to change organizational culture in large organizations, with estimates for successful culture change ranging from 10 to 32 percent (Smith, 2003). A study conducted by Carr, Hard, and Trahant (1996) found that a mere 10 percent of organizations that attempted to change management styles were successful in implementing the desired behaviors. Smith (2003) conducted a culture study of 210 managers from a cross-section of industries and functions across North America, finding that "only 19 percent of change efforts were rated as breakthrough or near breakthrough" (p. 252). A study conducted by the Conference Board of 166 North American and European companies found that only 32 percent reported success in changing the vision, values, and culture of the organization (Troy, 1994).

Kotter and Heskett (1992, p. 99) noted that in "ten successful cases of cultural change that we studied, hundreds or thousands of initiatives were required to implement the new visions and the new strategies." Schein's (1999) research supported this complexity, observing that shifting culture in an organization is an extraordinarily difficult task. Smith's (2002) study of 210 North American businesses found that 75 percent of change initiatives fail to make an impact. Smith (2003) reviewed three different studies which involved 225 samples of culture change, in addition to his study of 59 samples, and found that the success rate was only about 19 percent. Collectively, these studies demonstrate the difficulty and the need to identify change strategies to support organizational culture shifts, as failure to change has been identified as a main source for overall organizational failure (Cataldo et al., 2009; Dixon & Day, 2010).

Culture change can occur naturally over time, which is an ongoing reflection of incremental adjustments to the environment, or strategically designed as internally-driven change. However, the change may not take effect consistently across the organization. When done through internal stimulus, the control of cultural change can be planned and directed with some certainty; however, the process does not guarantee organizational change success (Graetz & Smith, 2010). Part of this planning includes employee involvement, particularly at different levels of the organization.

According to Chaudhry, Yuan, Hu, and Cooke (2016), there are two distinct schools of thought regarding the evolution of organizational culture. The first perspective is that organizational culture is unique and is shaped by numerous factors such as senior leadership values (Berson et al., 2008), leaders' shared vision and behaviors (Blattner & Walter, 2015; Schein, 1983), and organizational HR practices (Jung & Takeuchi, 2010). The second is a contingency approach in which culture is shaped by contextual values including societal values (Hofstede et al., 1990; House et al., 2004) and industry characteristics (Dickson, Aditya, & Chhokar, 2000; Dickson, BeShears, & Gupta, 2000; Gordon, 1985).

Research conducted by Chaudhry et al. (2016) of 3,245 respondents in 424 organizations in 12 different industries suggested that "while cultures might vary across industries as well as organizations, the differences are much greater across the latter than the former. The strength and direction of cultures within an organization appear to evolve mainly in response to attributes specific to the organization and do not necessarily reflect industry characteristics and trends" (p. 582). They found that "leaders have a powerful influence on cultures" (p. 582), which "underscores and parallels the conclusions of numerous qualitative studies, beginning with the work of Schein (1983)" (Chaudhry et al., 2016, p. 583).

Smith (2003) found that "over half of the culture change efforts were sponsored by either the CEO or the COO" (p. 260). While these top executives were most often the sponsors, "success was more likely when the sponsors were perceived to be 'other' officers and division/department heads rather than the chief executive officers (CEOs) and chief operating officers (COOs)" (p. 252). Smith (2003) noted the crucial role of the middle rank of leadership at the department, division, or business unit level to successful change. "Their sponsorship was perceived as more related to successful culture change than sponsorship by the highest corporate officers" (Smith, 2003, p. 259).

In addition to the middle rank of leadership driving successful culture change, "customer issues were more frequently cited for the very successful projects, while competition was more common for unsuccessful culture changes" (Smith, 2003, p. 252). Smith (2003) concluded that "success correlated most highly with the perception that (a) change and innovation are rewarded, (b) the change effort was kept small and manageable, (c) a dedicated, capable project team was assigned to the project, (d) there was visible support from the sponsor throughout the project, and (e) progress was tracked and publicized" (p. 254).

Schein (2004) posited that culture provides stability through the demonstration of consistent and expected behaviors, which people value. This stability is a two-edged sword, as it is valuable when the environment is stable, yet can be detrimental during turbulent and rapidly changing times (Cameron & Quinn, 2006; Kotter & Heskett, 1992; Schein, 2004).

Because culture change is not easy, it should be carefully planned; however, large scale culture change may be required if the firm's culture does not fit the changing marketplace, the industry is experiencing competitive pressures, the company's performance is mediocre, or the organization is experiencing considerable growth (Uttal, 1983; Simpson & Cacioppe, 2001). Brown (1995) and Simpson & Cacioppe (2001), noted numerous factors that make culture transformation difficult, with the major inhibitor being a lack of trust between management and team members. "While academics and experts on corporate culture have defined and described organizational culture extensively, leaders are still confronted with a sense of impotence when trying to change their team or organizational culture" (Simpson & Cacioppe, 2001, p. 397).

Smollan and Sayers (2009) studied culture, emotions, and change, and they determined that organizational culture is "a potentially relevant factor in the ways in which people respond to change" (p. 451). They noted that "organizational change has the capacity to alter culture . . . conversely, the culture affects the way in which staff respond to the change on an emotional level" (p. 452).

Schneider (2000) posited that strategy with cultural alignment is crucial for an organization to be financially successful in the long run. However, the alignment of strategy and organizational culture is an ongoing process (Ogbonna & Harris, 2002) and should be aligned by integrating strategic human resource management with HR practices (Cabrera and Bonache, 1999). While the field of culture change has made advances in recent years, questions regarding the 'what' and 'how' of culture change still remain (Elliott, Cohen, Reed, Nolet, & Zimmerman, 2014; Shier, Khodyakov, Cohen, Zimmerman, & Saliba, 2014).

Leveraging Human Resources for Culture Change. According to Hofstede (1994), changing a culture is not easy and isn't a "one-shot process." Rather, "it takes sustained attention from top management, persistence for several years, and usually a second culture assessment to see whether the intended changes have, indeed, been attained" (Hofstede, 1994, p. 11). Knowing that culture change is not easy, Ogbonna and

Harris (2002) identified three groups within an organization: (a) optimists – those who believe that culture can be managed; (b) pessimists – those who say it cannot be managed; and (c) realists – those who recognize that culture may change, but there are difficulties in doing this. The optimists include practitioners and a functionalist perspective, suggesting that culture can be identified, understood, managed, and changed. Supporters of the optimist perspective include Deal and Kennedy (1982) and Peters and Waterman (1982). Additionally, the optimist perspective has led to some researchers articulating models to guide organizational culture change (Bate, 1994; Brown, 1995; Dawson, 1994; Spicer, 2011).

The pessimistic perspective suggests that culture is too complex and inherent within organizations to be identified or managed (Legge, 1994; Ogbonna, 1993). This perspective stems from organizational change studies in which researchers question the intellectual and ethical basis of the optimist research stream, as well as the managers' capacity to understand and influence the deeply held values and beliefs of employees (Gagliardi, 1986; Grugulis, Dundon, & Wilkinson, 2000; Krefting & Frost, 1985; Ogbonna & Wilkinson, 2003; Spicer, 2011).

The realist viewpoint exists between the two extremes of the optimist and the pessimist, noting that while planned culture change may be difficult, cultures do change and managers can influence the processes. This viewpoint can be seen in mergers and acquisitions, where these are "situations in which the potential for cultural change is high, but for this to occur effectively, organizations need ways of identifying and understanding cultural differences and articulating the new desired culture" (Spicer, 2011, p. 248).

Chaudhry et al. (2016) research results "corroborate previous research indicating that the organizational-level factors considered in this study (i.e., leadership and human resources management systems) are associated with positive and constructive cultures, and can serve as levers for cultural change, in many different industry settings" (p. 584). Furthermore, research done by Ortega-Parra & Sastre-Castillo (2013) verified that "appropriate human resources practices greatly affect the perception of values" (p. 1079). Their research corroborated research done by Schein (1985) and Klein & Weaver (2000), noting that "the most effective practices to reinforce the perception of corporate culture are those related to reward systems (retribution and promotion) and training (Ortega-Parra & Sastre-Castillo, 2013, p. 1079).

Implementing Organizational Change

Today, perhaps the only thing constant is change, to the point that organizational change has now become a way of life. "In the face of a steady stream of diverse and overlapping change requirements and uncertainty, organizations continue to employ traditional change models. These depend on top-down executive leadership and focus, detailed risk analysis and mitigation, carefully planned and controlled communication, play-books that are 'rolled out,' tools and scripts to ensure common understanding, training people how to behave differently, and transition structures to govern the execution of work streams according to Gantt charts and detailed plans" (Worley & Mohrman, 2014, p. 214).

Continuous change occurs because organizations are open systems, continually interacting with their environments (Beckhard & Pritchard, 1992; Burke, 2008; Nadler & Tushman, 1989). "Every group and organization is an open system that exists in multiple environments" (Schein, 1990, p. 116). Environmental changes produce stress and constant pressure, driving the need to adapt and evolve. "But just as individuals do not easily give up the elements of their identity or their defense mechanisms, so groups do not easily give up some of their basic underlying assumptions merely because external events or new members disconfirm them" (Schein, 1990, p. 116).

Furthermore, organizations do not operate in isolation and often struggle to handle the multitudes of change demands required to remain competitive. McGreevy (2009) identified legislation as one of the drivers for change in 49 organizations across different industries in the United Kingdom, finding that the changes required by legislation were met. Other studies noted changes in the environment as the impetus for change (Flamholtz & Randle, 2008; Wright, van der Heijden, Bradfield, Burt, & Cairns, 2004). The current challenge due to legislative changes (health care reform) is a major system change, impacting the strategy of the health care industry. Health care organizations now must rethink their business strategies and operations to remain competitive, while at the same time ensure their culture supports these shifts.

Whatever the reason to change, the need to change is something organizations must learn to do well if they hope to be successful now and in the future. "How" to change, however, is greatly debated among scholars, consultants, and managers (Bamford, 2006; Beer & Nohria, 2000). "Many approaches and methods have been suggested to manage change, yet organizations undergoing change vary significantly in their structure, systems, strategies, and human resources" (Al-Haddad & Kotnour, 2015, p. 234). "If and when organizations needed to transform themselves, they would typically rent the change management capability from consultants. There was no need to pay for internal transformational change expertise that was rarely used. Companies that did staff up with organizational effectiveness consultants during periods of transformation often eliminated these departments once the pressing need for transformation subsided" (Worley & Mohrman, 2014, p. 215). While many approaches, methods, and change management models have been developed, the understanding of organizational change, unfortunately, lags far behind.

Researchers proved that change is difficult and often fails (Beckhard & Pritchard, 1992; Beer & Nohria, 2000; McLagan, 2003). The success rates for most organizational change initiatives are very low, creating doubts about the various approaches used by scholars and practitioners (Bamford, 2006; Beer & Nohria, 2000). Researchers determined that the success rate of change initiatives is only about 30 percent (Balogun & Hope Hailey, 2004; Beer & Nohria, 2000; Cameron & Quinn, 2006; Franken, Edwards, & Lambert, 2009; Grover, 1999; Kotter, 1995; McKinsey & Company, 2008). However, Rogers, Meehan, and Tanner (2006) noted that the success rate for culture-change initiatives drops to 10 percent.

A McKinsey study surveying 1536 executives found that only 38% of transformation change initiatives were successful (Isern & Pung, 2007). "The poor success rate in organizational cultural change seems to be partly due to organizational change agents' lack of systemic thinking and understanding of the causal structure and leverage possibilities for sustained change within the organization's context" (Molineux, 2013, p. 1590). Unfortunately, failed change attempts often lead to "cynicism, frustration, loss of trust, and deterioration in morale among organization members" (Cameron & Quinn, 2006, p. 11-12). Furthermore, "organizational change may become excessive when its demands exceed the employees' resources, therefore provoking negative reactions to change" (Johnson, 2016, p. 445).

There is a difference, though, between the initiation of a change and the true realization of a change. Lewin (1951) noted that change can be short-lived without a strong focus on a plan for permanency and Conner (1992) posited that simply implementing change does not ensure long-term commitment to it. The full realization or internalization of change occurs when the change reflects the "personal interests, goals, or values of employees" (Conner, 1992, p. 155). Furthermore, change only occurs when organizational members change their work behaviors in ways that support the desired change (Cameron & Quinn, 2011; Ribando & Evans, 2015).

Unfortunately, research noted that many change initiatives are short lived (Gilles, Wilson, & Elias, 2010, p. 92). "It is not enough just to introduce bundles of practices that may be effective in the short-term, but to embed these practices in the systemic structures of the organization that changes the norms of behavior within the organization and hence the culture" (Molineux, 2013, p. 1590). Molineux (2013) emphasized the need to apply the approach and changes to the whole organization it order for it to be sustained; otherwise elements of the "old" culture would likely reemerge and overwhelm the desired culture. According to Armenakis, Brown, & Mehta (2011), the message to sell an organizational change should influence five beliefs of the recipients of change:

1. Discrepancy – why the change is necessary in the organization;
2. Appropriateness – the logic of the change, demonstrating that it is right for the organization;

3. Efficacy – change recipients need to understand that they can acquire the needed skills and knowledge to enable the organizational change:
4. Principal support – demonstrates that the change agents are modeling the requested behaviors; and
5. Valence – change recipients should understand how the change personally impacts them.

Researchers determined that the accumulation of failed changes often creates cynicism within the organization, creating a cycle where subsequent change efforts become more difficult to implement (Hammond, Gresch, & Vitale, 2011; Stanley, Meyer, & Topolnytsky, 2005). Even if changes are considered successful, employees may be overwhelmed by the number of changes they are expected to adopt over a given period of time. (Beaudan, 2006; Hammond, Gresch, & Vitale, 2011; MacIntosh, Beech, McQueen, & Reid, 2007).

The literature noted that short-term change is more successful when compared to long-term change (Al-Haddad & Kotnour, 2015; Shields, 1999; Ulrich, 1998). "Organizations that predict small changes in conditions, and respond promptly to these changes, gain a competitive edge" (Al-Haddad & Kotnour, 2015, p. 243). Berwick (1998) posited that short-term changes that occur within ongoing processes are prime opportunities to implement change and improvement. Ulrich (1998), however, noted that the pace of response is really what determines the success of a change. "Winners will be able to adapt, learn and act quickly, losers will spend time trying to control and master change" (Chrusciel & Field, 2006, p. 130).

Change Models and Levels. Many change models are generally based on Lewin's (1951) three stages of change – unfreeze, change, and refreeze (Weick & Quinn, 1999). "Lewin conceived of change as modification of the forces keeping a system stable. A particular set of behaviors or outcomes at any moment in time was the result of two opposing forces: those striving to maintain the status quo and those pushing for change" (Worley & Mohrman, 2014, p. 215). Lewin's first step involves unfreezing the status quo and preparing the organization for change. "Accordingly to Lewin, human behavior can be conceptualized as a quasi-stationary equilibrium resulting from driving and restraining forces" (Hammond, Gresch, & Vitale, 2011, p. 489). The second step involves moving the behaviors of the organization, department, and individuals. "It involves intervening in the system to develop new behaviors, values, and attitudes through the development of new skills and competencies or change in organizational structures and processes" (Worley & Mohrman, 2014, p. 216). Lewin's third step focuses on stabilizing the new equilibrium to avoid reverting to previous behaviors, often "accomplished through the use of supporting mechanisms, such as organizational rewards, that reinforce the new organizational state" (Worley & Mohrman, 2014, p. 216).

Other researchers such as Tichy and Devanna (1986), Nadler and Tushman (1989), and Beckhard and Harris (1977) also created three stages of change. All of these models are based on a process that looks at the current organization, creates a transition phase, then concludes with a revised organization. "Traditional approaches to organizational change generally follow a linear, rational model in which the focus is on controllability under the stewardship of a strong leader or guiding coalition"

(Graetz & Smith, 2010, p. 135). The underlying assumption of a linear model is that organizational changes involves predictable steps that can be planned and managed (Collins, 1998; Graetz & Smith, 2010).

While numerous researchers have built their models on the three-stage approach, others criticized the model, noting that change is not linear; rather, change is evolutionary and messy (Burke, 2008; Kanter, Stein, & Jick, 1992). For example, Greiner (1998) proposed an organizational life cycle approach to change, in which he noted that organizations undergo distinct and predictable stages of development. These stages involve growth and evolution, alternating with periods of crisis and revolution. Researchers since Lewin have searched for strategies to effectively implement change. During this search, “there has been recognition by researchers that there is no one right way for effective change models to be applied in particular organizational contexts” (Stewart & Kringas, 2003; Weller & Van Gramberg, 2006, p. 553-554).

Beer and Nohria’s (2000) research identified two basic change theories for leading change: (a) Theory E – based on economic value, considered the “hard” approach to change, and involves economic incentives, layoffs, and downsizing; and (b) Theory O – based on an organization’s capability, considered the “soft” approach, and develops the organizational culture and individual’s capabilities.

A major change such as culture transformation is not linear; rather, it is a fluid and unpredictable process, often filled with obstacles and surprises that organizations need to manage. As a result, culture transformation requires considerable time, commitment, and flexibility to truly achieve organizational change. “As with any real transformative process, no two journeys are identical. And while there are lessons to be shared and learned from those who have gone before, each organization must seek and discover its own path to meaning" (Graetz & Smith, 2010 p. 146). Graetz & Smith (2010) found evidence from numerous case studies of failed change implementations that indicated that treating change as a single, momentary situation may be limited.

Dunphy and Stace (1993) proposed that "managers and consultants need a method of change that is essentially a 'situational' or 'contingency' method, one that indicated how to vary change strategies to achieve 'optimum fit' with the changing environment" (p. 905). This is particularly important, as researchers noted that one-size-fits-all approaches usually result in failing change efforts or not achieving the change's full potential (Al-Haddad & Kotnour, 2015; Kotter & Schlesinger, 2008, Sikoro, 2008). "Many writers have suggested methods to implement change; nevertheless, in recent years, it has become more recognized that one or even two methods to change cannot cover the vastly different change situations" (Ad-Haddad & Kotnour, 2015, p. 235). While many change approaches and methods have been suggested, organizations vary in their structure, strategies, and talent, so these change approaches and methods may not work in every organization based on these variables (Al-Haddad & Kotnour, 2015).

Al-Haddad & Kotnour (2015) proposed a connection between the three main knowledge areas of change types, change methods, and change outcomes. They found that no one approach can serve as the "silver-bullet" for most change efforts. Rather, "the probability of success varies from one organization to another as organizations undergoing change vary vastly in their structure, systems, strategies, and human resources" (Al-Haddad & Kotnour, 2015, p. 254).

Literature highlighted different levels of change, based on how broad and deep the changes impact the organization, as well as the length of time the changes are implemented. Burke (2008) explained three levels of change: (a) individual – isolated to the person; (b) group – comprised of individuals, often being the work team; and (c) larger system – the compilation of work teams, which could include parts of the entire organization. He noted that changes at the three levels usually don't start all at the same time; rather, they start with individuals, then move to groups, then move to some or all of the larger system.

According to the research, there are three factors in order for change to be successful: (a) individuals must understand and believe there is a need for organizational change (Armenakis & Harris, 2009; Fernandez & Rainey, 2006); (b) individuals must be involved in the change process planning and implementation (Oswald, Mossholder, & Harris, 1997); and (c) the benefits of change must be communicated throughout the organization at multiple levels (Conway & Monks, 2011; Dent & Goldberg, 1999). "Organizational change consultants sometimes come up with 8-step or 10-step programs to bring about major planned change initiatives in organizations, however those of us who have worked in the organizations know that the step-by-step process is difficult to apply in the real world, as we work in complex organizations consisting of people with lots of different views, values, behaviors and interactions" (Molineux, 2013, p. 1588). This demonstrated the importance of understanding and appreciating the organization's culture and the significant role it plays to support organizational change because culture is multifaceted, deep, and broad.

Employee Involvement in Change Efforts. While short-term change may be more successful in comparison to long-term change, organizations want long-term change; however, implementing long-term, sustainable change is challenging strong leadership that encourages employee involvement throughout the change process (Al-Haddad & Kotnour, 2015; Harrison, 2011; Rachele, 2012; Schalk, van der Heijden, de Lange, & van Veldhoven, 2011). "Cumulative advances in our understanding of human motivation and organizational behavior along with societal and governmental concern for workers' rights and well-being resulted in radical shifts in human resource practices and high involvement work systems" (Worley & Mohrman, 2014, p. 214). Furthermore, Petrou et al. (2012, 2016) noted that focusing on the challenge of change and taking on more responsibilities improves employee engagement.

"Management texts and business magazine case studies tend to perpetuate and legitimize a rational, leader-centered model of organizational change" (Graetz & Smith, 2010, p. 137). Harrison (2011) supported this, noting that long-term change rarely occurs without powerful leaders. Kimball (2005), however, found that within the most successful changes at health care organizations, "the group of people charged with guiding change included champions from management, frontline staff, patients, families and physicians" (p. 15). He noted the importance of engaging the workforce "in creating an environment where new ideas and behaviors are welcomed and change experimentation and change are safe" (Kimball, 2005, p. 15). Additionally, Graetz and Smith (2010) highlighted the need to seek out competing voices and work with the contradictions and tensions that are part of a messy, real business situation.

The value of employee involvement in change efforts should not be underestimated. According to Narine and Persaud (2003, p. 180), the initial momentum of large-scale organizational change "eventually decelerates because of internal forces related to management's inability to gain employee commitment and then maintain it over the long haul." Additionally, researchers (Armenakis, Harris, & Mossholder, 1993; Caliskan & Isik, 2016; Wanberg & Banas, 2000) noted that employee involvement during a major change reduces the resistance, as understanding the need for the change and the perceived ability to change are considered critical. Having previous professional change experiences, as well as theoretical and practical knowledge about the change efforts, help support real-life changes (Caliskan & Isik, 2016; Monica & Liviu, 2013). Rachele (2012) supported the position of the value of ongoing employee involvement and proposed that a participative approach such as action research can be effective for successful long-term change.

Change leaders need the involvement of people who have the resources, the knowledge and the connections to make things happen. Kanter (2000) noted, however, that leaders must have conviction, commitment, and confidence in the change before they can expect others to accept the change. Numerous authors and researchers suggested there is a positive correlation between employee participation and successful change (Kykyri, Puuitio, & Wahlstrom, 2010; Wheatley & Kellner-Rogers, 1998).
In addition to the benefit of achieving successful change, Kovach (1995) found that employees wanted a feeling of being "in" on things in his employee motivation research. "The role of the twenty first century leader is to energize and revive the creativity lying dormant at all levels of the organization" (Graetz & Smith, 2010, p. 137).

While research noted the importance of employee involvement, this involvement during a transformational change must be carefully planned. Kahan (2010) described involvement as connecting with people, building relationships, and creating meaning together to move forward with change. Rowley, Lujan, and Dolence (1997) highlighted the benefits of collaboration and participation, noting that "if people are involved in helping to shape the change, or if they believe the change will actually benefit them, they are less likely to resist and can be effective in reducing resistance among others" (p. 275). Kinlaw (1988) noted the connection of employee involvement and performance, specifically "the degree to which employees perceive themselves as involved . . . is a predictor of performance" (p. 42). Enderby and Phelan (1994) posited that an issue implementing sustained cultural change is achieving critical mass, which may be developed through an effective change management process that involved individuals in the change process. "Once a critical mass is achieved, a new norm is created, so that 'the way we do things around here' is transformed to that new norm. The crucial mass can be achieved by embedding the change in the systemic structures of the organization" (Molineux, 2013, p. 1594).

Action research "requires collaboration between researchers and practitioners and can be thought of as a marriage between 'Theory' and "Praxis'" (Hammersley, 2004; Afify, 2008, p. 153). The collaboration takes everyone's view into consideration to understand the situation better. Every team member's perspectives are significant, not just those of the researcher. Focusing on the value of all team members' perspectives produces additional insights because of the diversity of the team members.

Employees' change readiness is crucial when planning the change, as employee attitudes are one of the major issues to consider (Armenakis & Bedian, 1999; Caliskan & Isik, 2016). Caliskan and Isik (2016) found that "as the work content gets global, members have more supportive attitude toward change, maximize their participation to the change process; readiness and commitment to the change is higher, and the work environment is perceived as more positive since their optimism is higher" (p. 417).

"Employee involvement pays an important role in the success of high performance initiatives" (Chow & Liu, 2009, p. 2292). Employee involvement can be categorized into two approaches – top-down or bottom-up. Public sector organizations have usually adopted top-down approaches to the management of change initiatives (Ferlie, Ashburner, Fitzgerald, & Pettigrew, 1996). "Proponents of 'top-down' or 'strategic' change (Pettigrew, 1985) shifted attention to the possibilities of radical change and how this might be achieved" (Conway & Monks, 2011, p. 190-191). Supporters of 'bottom-up' approaches emerged from the organization development tradition (Beckhard & Harris, 1977) and focused on employee involvement and participation through incremental change processes (Cummings & Worley, 2005; Quinn, 1980).

"Organizations can look very different from the top compared with the middle or bottom where the actual work is done" (Hofstede, Hofstede, & Minkov, 2010, p. 374). Because of these differences, it is valuable to consider the different employee levels. Woodridge, Schmid, and Floyd (2008) noted three reasons why there is particular interest in middle managers: (a) middle managers serve as agents of change; (b) middle managers serve as important mediators between different levels and units; and (c) middle managers provide a good point of observation to study the process to build and renew capabilities. Conway and Monks (2011) specifically noted that middle managers consider the ways to manage the ambivalence produced by their position as the interface between top-down and bottom-up processes of change.

Research demonstrated, however, that middle managers may have a positive or a negative influence when supporting change. Middle managers may have a negative impact because of their resistance to change and how they may slow down decision-making (Dopson & Neumann, 1998; Fenton-O'Creevy, 1996). Raelin and Cataldo (2011) posited that middle managers are often ineffective in promoting change due to the lack of empowerment as a result of executive constraints. Other researchers suggested that middle managers make a crucial positive contribution to organizational performance and change (Balogun & Johnson, 2004, 2005; Currie & Procter, 2005; Floyd & Wooldridge, 1994, 1997; Huy, 2002).

Middle managers are now seen as facilitators of change, while previously they were often viewed as obstacles to change (Raelin & Cataldo, 2011). While middle managers are influential, they may be personally impacted by the change. The negative impact of change on middle managers appears to be especially damaging, which leads to decreases in loyalty, morale, motivation and job security, where such change involves redundancy and delayering (Conway & Monks, 2011; Worrall & Cooper, 2004).

Reinforcing Organizational Change

There is a difference between the initiation of a change and the true realization of a change. While implementing organizational change takes considerable time and effort, the change process is not complete. Lewin (1951) noted that change can be short-lived without a strong focus on a plan for permanency and Conner (1992) posited that simply implementing change does not ensure long-term commitment to it. “A big complaint voiced about many change initiatives is that they get announced with great fanfare, but often run out of steam or fall victim to organizational inertia before they’ve achieved promised results” (Smith, 1998, p. 45).

Changes should be reinforced to ensure that changes are not superficial or temporary; reinforcement tactics could include the use of incentives, performance metrics, and learning programs (Heckelman, Unger, & Garafano, 2013). Reinforcement is crucial to the success of organizational change, as people often have a natural tendency to revert back to previous processes and what they know. However, because reinforcement steps occur later in the change process, they are often neglected because organizations often move on to the next change. “No strategic change will occur if it is not constantly reinforced and monitored by the people at the top, and then repeated throughout the management chain of command” (McAllaster, 2004, p. 326). The full realization or internalization of change occurs when the change reflects the “personal interests, goals, or values of employees” (Conner, 1992, p. 155). Furthermore, change only occurs when organizational members change their work behaviors in ways that support the desired change” (Cameron & Quinn, 2011, Ribando & Evans, 2015). Therefore, successful change takes reinforcement by leaders and concerted efforts to ensure the reinforcement strategies are in place to avoid reverting back to old behavior patterns.

Chapter 3: Method

The purpose of this action research study was two-fold: (a) to further the organization's on-going culture transformation and (b) to develop employees at a health care organization to better understand organizational culture and change management concepts to support this change and future changes.

Methodology and Method

Since organizational culture was established as a school of thought, "cultural scholars have fundamental disagreements about epistemology, methodology, political ideology, and theory" that are on-going (Clegg, Hardy, Lawrence, & Nord, 2006, p. 726). Researchers espousing the qualitative research methods, including Schein (2004), claimed that information and quality of data can only be achieved through qualitative research methods; those supporting quantitative methods (Cameron and Quinn, 2006; Denison, 1996) pointed out that there are comparative cultural dimensions, in which only quantitative research will work.

This study involved the immersion into one organization and utilized a qualitative research approach. This was an emerging process, indicating that "the intent or purpose of a study and the questions asked by the researcher may change during the process of inquiry based on feedback or responses from participants" (Creswell, 2012, p. 130). "Qualitative methods permit inquiry into selected issues in great depth with careful attention to detail, context, and nuance" (Patton, 2002, p. 227).

In qualitative research, a central component of the purpose statement and the research questions is the central phenomenon. According to Creswell (2012, p. 129), "the central phenomenon is the concept of process explored in qualitative research."

The central phenomenon for this study was to better understand employee involvement to increase the success of an organization's on-going culture transformation. One of the ways to study the central phenomenon was through the use of action research with employees, with the purpose of "generating understanding" (Stenbacka, 2001, p. 551). Several researchers (Benn & Baker, 2009; Burns, 2007; Coghlan, 2002; Flood, 2010, and Molineux, 2013) reported that a linear view of change is not suitable for complex organizational systems and suggested using a systemic action research approach for complex pluralist contexts. Furthermore, Molineux (2013) supported the use of action research to specifically design and implement culture change "by using a systemic approach to strategic human resource management (SHRM) embedded in action research reflective and cyclical processes" (p. 1588).

Action research is the process through which the researchers and the team members work together to design and conduct all phases of the research process, including design, data collection and analysis, planning, implementation, and evaluation (McTaggart, 1991; Rai, 2012; Whyte, 1991). "Action research enlists the minds, hearts and actions of people and that this drives sustainable change" (Thomson, 2015, p. 310).

Definitions and Principles of Action Research

Action research (AR) represents a family of practices, including a wide range and levels of inquiry, activities, and methods (Bradbury Huang, 2010; Coghlan & Shani, 2005; James, Blomber, Liljekvist, & Kihlgren, 2015; Reason & Bradbury, 2001). Action research "is considered to be a family of approaches that operates in a wide variety of settings and with great diversity and so criteria may need to be approach specific" (Coghlan & Shani, 2014, p. 524). Furthermore, Greenwood (2015) specified that action research is a “strategy for using multiple theories and methods opportunistically for the purpose of promoting democratic social change, and that many of the major figures in AR are people from a variety of disciplines whose work is used syncretically in AR projects” (p. 199). Chandler and Torbert (2003) identified 27 different varieties of action research. Because of the complexity of action research studies, there is not a “right way” to do action research (Noffke, 2009, p. 8).

When using “action research” as a search and indexing term, it may be somewhat confusing, as some terms are used interchangeably. “For example, community-based participatory research, participatory AR (PAR), participatory action learning and AR (PALAR), participatory evaluation, action evaluation, action science, developmental evaluation, action inquiry, community-driven research, collaborative inquiry, action learning and appreciative inquiry are just some of the terms which often have overlapping or ill-defined distinction to that of the term AR alone” (Piggot-Irvine, Rowe, Ferkins, 2015, p. 547-548).

Action research “is unique in the way that research informs practice and practice informs research synergistically” (Näslund, Kale, & Paulraj, 2010, p. 332). Action research links theory and practice, and it “has an obligation to generate knowledge and action that will bring about change” (Kemmis, 2010; O’Sullivan, Hocking, & Spence, 2014, p. 23).

Kurt Lewin is often mentioned as the first person to use the term “action research” (Susman & Evered, 1978). While Lewin may be acknowledged using the term first, one of the most frequently used definitions is that from Rapoport (1970); see definitions of action research in Table 1.

Table 1

Action Research Definitions

Researcher(s)	Definition
Rapoport, 1970, p. 499	“aims to contribute to the practical concerns of people in an immediate problematic situation and to the goals of social science by joint collaboration within a mutually acceptable ethical framework”
Shani and Pasmore, 1985, p. 439	“an emergent inquiry process in which applied behavioral science knowledge is integrated with existing organizational knowledge and applied to solve real organizational problems It is simultaneously concerned with bringing about change in organizations, in developing self-help competencies in organizational members and adding to scientific knowledge. Finally, it is an evolving process that is undertaken in a spirit of collaboration and co-inquiry”
McKernan, 1988, p. 6	“a form of self-reflective problem solving, which enables practitioners to better understand and solve pressing problems in social settings”
McCutcheon and Jung, 1990, p. 148	“systematic inquiry that is collective, collaborative, self-reflective, critical, and undertaken by the participants of the inquiry. The goals of such research are the understanding of practice and the articulation of a rationale or philosophy of practice in order to improve practice”
Argyris and Schön, 1991, p. 86	“Action research takes its cues – its questions, puzzles, and problems – from the perceptions of practitioners within particular, local practice contexts. It bounds episodes of research according to the boundaries of the local context. It builds descriptions and theories within the practice context itself, and tests them there through intervention experiments – that is, through experiments that bear the double burden of testing hypotheses and effecting some (putatively) desired change in the situation”
Reason and Bradbury, 2001, p. 1	“a participatory, democratic process concerned with developing practical knowing in the pursuit of worthwhile human purposes, grounded in a participatory world view which we believe is emerging at this historical moment. It seeks to bring together action and reflection, theory and practice, in participation with others, in the pursuit of practical solutions to issues of pressing concern to people, and more generally the flourishing of individual persons and their communities”
Piggot-Irvine, Rowe, Ferkins, 2015, p. 548	“having core elements of systemic research in a collaborative inquiry process that is associated with evidence-based decision-making both before and after change”

While there may be a lack of consensus regarding an action research definition, Dick (2015) reviewed the Encyclopedia of Action Research (Coghlan & Brydon-Miller, 2014) and identified five specific aspects of action research. First, action research is an extensive process with many diverse methods united by values, intentions, and processes. Second, action research is participatory, a good way to achieve outcomes and "a worthwhile end in itself" (Dick, 2015, p. 432). Third, action research is action-oriented, with the intention to attain improvement at local levels. Fourth, action research includes critical reflection as an "almost-universal component" (Dick, 2015, p. 432). Fifth, action research uses a cyclical process integrating action and reflection. These features of action research are instrumental, and these features differentiate action research from other methodologies.

Action Research as a Differentiated Methodology

Action research is grounded in qualitative, quantitative, and mixed methods (Chandler & Torbert, 2003; Creswell, 2002; Greenwood, 2015; Greenwood & Levin, 1998; Torbert, 2000). "In action research, much of the information exchange, planning and theorizing takes the form of discussion, which is qualitative. Therefore, although quantitative components can be included, much action research is qualitative" (Dick, 2015, p. 435). "The tools that specifically characterize AR are neither quantitative nor qualitative, at least in a 'conventional' way, but have a strong performative component: assisting persons or groups, networking, promoting, and planning actions are, ultimately, strategies aimed at helping participants to engage in the production of knowledge and to address practical challenges" (Marti, 2016, p. 169).

Action research is different from other methodologies in numerous ways. Participation in action research is co-researching or researching with people, rather than on people (Hynes, Coghlan, & McCarron, 2012; Reason & Bradbury, 2008). "In action research there are no 'subjects,' rather 'participants' and it is the participants who by working in partnership with researchers identify problems, determine the research agenda and ultimately benefit from the research" (Josif, Barclay, Bar-Zeev, Kildea, & Brittin, 2012, p. 393). Blumberg, Cooper, & Schindler (2005) compared action research to other research methodologies in several categories, noting the differences (see Table 2).

Table 2

Differences Between Action Research and Other Research Methodologies

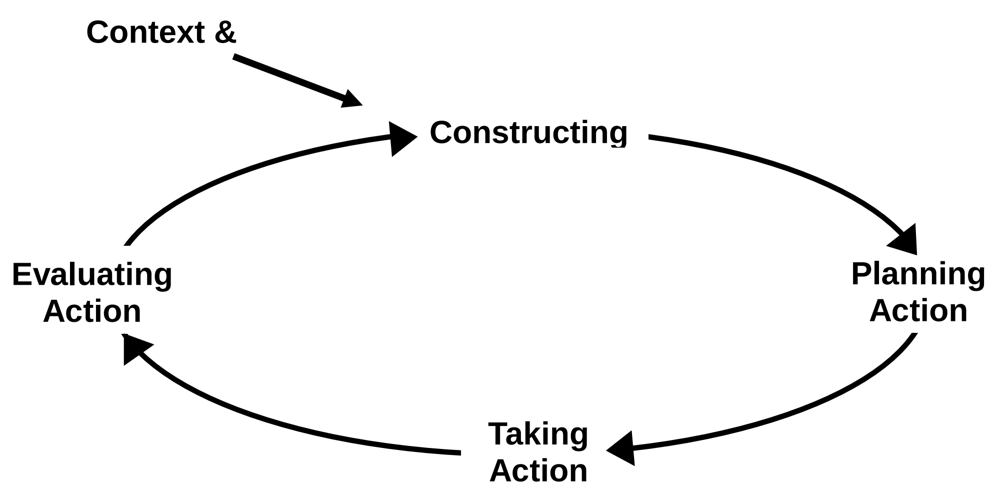
Action Research	Other Research Methodologies
Addresses real-life problems and is bounded by the context	Addresses real-life as well as scientific problems, and attempts to identify general principles and their contingencies
Collaborative venture of researchers, participants, and practitioners	Clear division of roles between researchers, participants, and practitioners
Continuous reflecting process of research and action	Usually, clear division between the research process and implementation processes
Credibility - the validity of the action research is measured on whether the actions solve the problems and realize the desired change	Credibility – the validity of research is established by statistical core figures and successful replications

Blumberg, Cooper, & Schindler (2005, p. 297)

The researcher guiding the project acts in a unique role; unlike traditional research forms, the researcher is not an observer, but becomes an active participant in action research (Checkland, 1991; Näslund, 2002; Näslund, Kale, & Paualraj, 2010; Schein, 1987). "Action research therefore requires a combination of participative action and critical reflection from the researcher (Ballantyne, 2004; Dick, 2001) since he/she both contributes to, and evaluates, the change process during the participation" (Näslund, 2002; Näslund, Kale, & Paulraj, 2010, p. 336).

Action research is a dynamic, cyclical process of inquiry in which cycles are messy, not linear. The cycles can take unpredictable routes, sometimes going backward to move forward in the next cycle. Action research suggests that change is more cyclical than that implied by Lewin's refreezing stage (Worley & Mohrman, 2014). This is key, as the learning throughout is part of the process to bring clarity to the issue and take action to address the issue. Coghlan & Brannick (2010) show this process through a simple four-cycle process shown in Figure 1.

Figure 1. Cycles of Action Research



Source: Coghlan & Brannick (2010, p. 8)

Quality of Action Research

Action research is characteristically full of many choices (Coghlan & Shani, 2014; Reason, 2006). Reason (2006) challenged action researchers to be aware of the choices they face and make them clear to themselves, to the team members, and to management. Often times, what has been lacking to drive quality action research "has been a rigorous reflection on the choices that are made, in relation to, for example: contextual analysis, design, purposes, degrees of collaboration, planning, implementation, review and so on" (Coghlan & Shani, 2014, p. 527). Pasmore, Woodman, & Simmons (2008) proposed three criteria to guide the quality of action research: (a) Rigorous – data-driven, multiple methodologies, and reliability across settings; (b) Reflective – historical impact, referential, community of practice, and repeated application; and (c) Relevant – practical, face-valid, and significance.

Insider Action Research

Insider action research is "centered on the process whereby the action research is conducted by a full member of an organizational system, rather than by one who enters the system as a researcher and remains only for the direction of the research" (Holian & Coghlan, 2013, p. 400). The projects identified and selected by the insider action researcher in collaboration with leadership are opportunities worthy of further exploration or needed within the organization. "The puzzles and dilemmas of interest to insider action research practitioners are messy, complex and networked, difficult to describe and control, and not easily operationalized, estimated, or measured" (Holian & Coghlan, 2013, p. 401). Furthermore, insider action research is challenged with practical issues within an organization and seeks to understand or resolve these issues by using iterative processes, rather than sequential steps which can be planned and easily managed.

Generalizability of Action Research

Generalizing the results of action research is difficult to claim, as most action research studies are built on a specific case study (Afify, 2008; Denscombe, 2003; Gill &

Johnson, 2002). "Although action researchers may make claims to generalizability across local contexts, their generalizations are unlike the 'covering laws' to which normal social science aspires; they do not describe relationships in which the values of a group of dependent variables are uniquely determined by the values of a group of independent ones. Rather, their generalizations tend to describe thematic patterns derived from inquiry in one setting the valid transfer to other settings of which depends on confirmation there by further experiment" (Argyris & Schön, 1989, p. 613). Action researchers believe that knowledge is generated and tested situationally and that gaining such knowledge requires the engagement of stakeholders in the situation whose understandings are as central to the process as are the action researchers (Greenwood, 2015). "The power of action research rests in its ability to take on complex systems and multifaceted problems without expecting simple answers but with a commitment to honoring the knowledge and experience of others and working together to bring about positive change" (Brydon-Miller & Coghlan, 2014, p. 227).

Population and Sample

The population for this action research project was employees based within two business groups within a large health care organization based in the Midwest; these two businesses employ over 60,000 employees. Due to the large size of the population, the study used purposeful sampling in which "researchers intentionally select individuals and sites to learn or understand the central phenomenon" (Creswell, 2012, p. 206). "The logic and power of purposeful sampling derive from the emphasis on in-depth understanding" (Patton, 2002, p. 46).

To participate in the action research process, I worked with senior leadership to identify team members from Businesses 1 and 2. The purposeful sample was selected by the researcher and senior leadership because of their knowledge and expertise, their positive support of current culture activities, and the desire to provide a development opportunity for participants to learn through this process. I connected with their managers to gain support for their participation. Based on the conversations with senior leaders and management, I recruited seven employees from two businesses who represented different grade levels, different roles, and different departments (Communications, Human Resources, Payment Integrity, Sales Support, Procurement, Network, and Sales Technology) to best represent the employee population.

Research Design

This study utilized a research design using action research methodology because "action research aims at solving specific problems within a program, organization, or community" (Patton, 2002, p. 183). Action research was appropriate because: (a) it provided a practical focus; (b) it encouraged collaboration within the workplace; (c) it was a dynamic process; (d) it created a plan of action; (e) it implemented the plan of action; and (f) it prompted the sharing of research among participants. Several researchers proposed that because culture is dynamic, it is probably best studied by action research methods that get "insiders" involved in the research (Argyris, Putnam, & Smith, 1985; French & Bell, 1984; Lewin, 1952; Schein, 1987, 1990).

Action Research Framework. "In many fields, knowledge seems to expand from a common core of basic concepts outward, but action research has origins in multiple disciplines and geographical locations, and our shared task as an action research community has been to seek one another out and to form a common understanding of the breadth of theory and practice which inform our work" (Brydon-Miller & Coghlan, 2014, p. 226). Because of the origins in multiple disciplines, McIntyre (2008) insisted that "there is no fixed formula for designing, practicing, and implementing participatory action research projects. Nor is there one overriding theoretical framework that underpins PAR processes" (p. 3).

Action research leverages numerous philosophical frameworks, "resulting in a variety of approaches to doing AR" (Maurer & Githens, 2009, p. 273). For example, Coghlan & Brannick (2010) proposed a four-step process, while Maurer & Githens (2009) proposed a five-step process. Researchers Plano Clark & Creswell (2015) leveraged considerable research and frameworks (e.g., Mills, 2011; Stringer, 2007) to develop an eight-step process. As a first-time action researcher, I reviewed many frameworks and chose to use Plano Clark & Creswell's (2015, p. 440) eight-step process to guide this study because of their considerable experience. I felt their process was based on many studies, was easy to follow and understand, detailed the steps throughout the research process, and emphasized reflection throughout the process. This reflective practice component was important, as one of this study's purposes was to develop employees to better understand organizational culture and change management concepts. "Reflective practice and action learning are focused on the individual, cooperative inquiry and various forms of deliberative decision making are focused on the group" (Burns, 2014, p. 5). The Plano Clark & Creswell's (2015, p. 440) eight-step process can be aligned to Coghlan and Brannick's (2010) four cycles of action research – see Figure 2. This eight-step process is described further in Chapter 4 as this study's framework:

Step 1: Determine whether action research is possible in your setting and with your colleagues;

Step 2: Specify the problem you want to study;

Step 3: Locate resources to help you address the problem;

Step 4: Identify information you need to examine the problem;

Step 5: Implement the data collection;

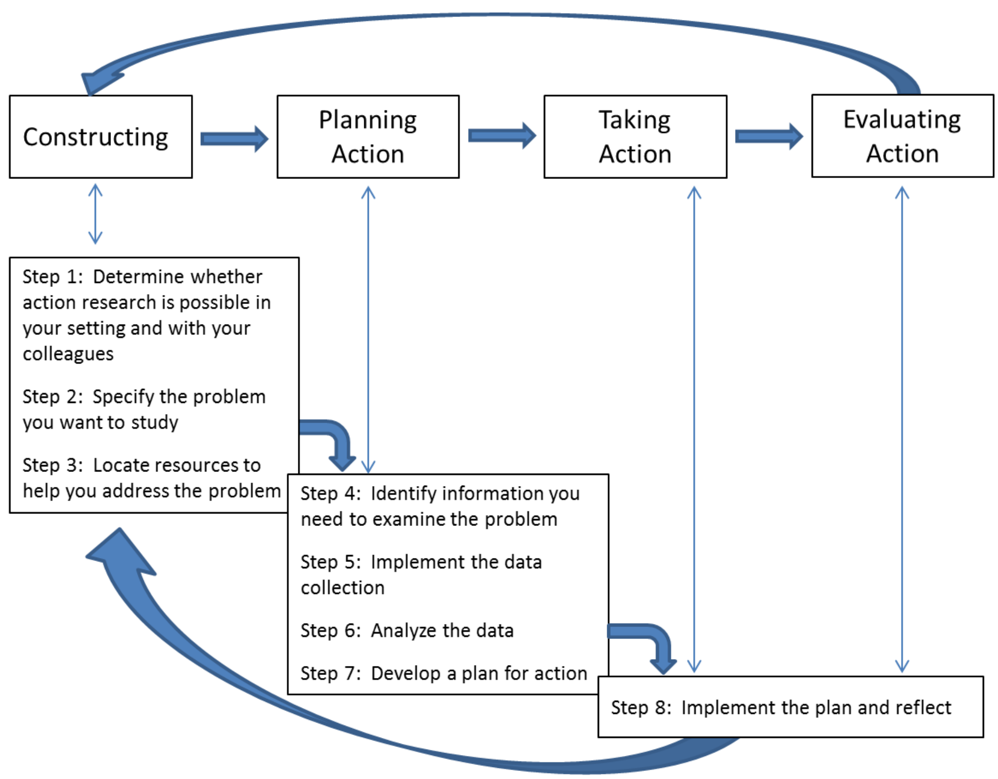
Step 6: Analyze the data;

Step 7: Develop a plan for action; and

Step 8: Implement the plan and reflect.

Figure 2

Integration of Two Organizational Schemes for the Step-by-Step Process of Action Research



Data Gathering and Analysis. To research the new employee experience, we created a plan to gather data according to Mills' (2011) three dimensions: (1) Experiencing – observing and taking fieldnotes; (2) Enquiring – researchers asking others for information; and (3) Examining – using and creating existing records.

Table 3

Data Gathering Plan

Experiencing	Enquiring	Examining
Participant observation	External best practices	Current situation – culture transformation
	Internal best practices	Current employee types
	Focus groups – new employees	Current employee types
	Focus groups – hiring manager	Current hiring information
	Focus group – business liaisons	Annual employee survey
	Senior leader interviews	Current new employee onboarding process

Experiencing. To gather data, I conducted participant observation, which is "the process of gathering open-ended, firsthand information by observing people and places at a research site" (Creswell, 2012, p. 213). As the insider action researcher, I assumed the role of "participant observer" who engaged in activities at the study organization. To document the observation, I recorded field notes and maintained a journal.

Enquiring. As a team, we gathered data focused on the new employee experience by enquiring in three major ways:

1. *External and internal best practice research.* We researched five large companies to identify best onboarding and orientation best practices; based on this information, we identified nine best practices. We reviewed the current

processes of four departments within Business 1 and two departments within Business 2; based on this information, we identified five best practices (see Chapter 4, Step 5).

2. *Focus groups of new employees, hiring managers, and business liaisons.* We used purposeful sampling to identify participants to represent departments, locations, and levels. We conducted focus groups with 32 employees, 20 hiring managers, and 10 business liaisons. Table 4 provides an overview of the schedule, employee population, facilitators, and number of attendees.

Table 4

Focus Group Schedule & Attendance

Date	Time (Central)	Group	Facilitator	Attendees
New Employees				
1/22/16	12:30-1:30	New Employees-Business 1 Office Locations	TM4	5
1/25/16	11-12	New Employees-Business 1 Telecommuter	TM4	9
1/26/16	3–4	New Employees-Business 2 Field & Telecommuter	TM3	5
1/29/16	12:30 – 1:30	New Employees-Business 1 Headquarter Location	TM4	6
1/29/16	2–3	New Employees-Business 2 Headquarter Location	TM3	7
Hiring Managers				
2/1/16	9–10	Hiring Managers-Business 1 Telecommuters	TM4	8
2/3/16	11-12	Hiring Managers-Business 2 All	TM4	7
2/3/16	3–4	Hiring Managers-Business 1 Office Locations	TM3	5
Business Liaisons				
2/8/16	1–2	Business Liaisons-Businesses 1 & 2	TM4	10

3. *Senior leader interviews.* I conducted three one-on-one interviews with senior leaders, asking each leader three open-ended questions to encourage leaderhip to "best voice their experiences unconstrained by an perspectives of the researcher or past research findings" (Creswell, 2012, p. 218). Based on their responses, I identified four themes from the interviews (see Chapter 4, Step 5).

Examining. This study was conducted within a data-rich organization, so we leveraged existing archival data to better understand the current situation and data gathered to date.

1. *Current employee type information.* We looked at the composition of the locations of current employees to compare with the composition of the locations of new hires. By gathering this data, we realized that we hire over 20% telecommuters as compared to approximately 80% employees in office locations (field and headquarters).
2. *Current hiring information.* We gathered data showing the numbers of employees hired in 2015; the organization hired over 11,000 new hires in Business 1 and over 370 new hires in Business 2.
3. *Annual employee survey.* I reviewed 292 comments within the 2015 annual employee survey; these comments were focused specifically on onboarding, orientation, and the new employee experience. Based on the review, I categorized and identified eight themes (see Chapter 4, Step 6).

Chapter 4: RESEARCH RESULTS

The purpose of this action research study was two-fold: (a) to further the organization's on-going culture transformation and (b) to develop employees at a health care organization to better understand organizational culture and change management concepts to support this change and future changes. The use of action research was a way to conduct research within an organization to benefit the organization, the research participants, and the insider action researcher. This chapter is organized into the eight Plano Clark & Creswell's (2015) specific eight steps to follow the actions taken during this research study.

Step 1: Determine Whether Action Research is Possible In Your Setting and With Your Colleagues

The U.S. health care system is experiencing revolutionary change that many other industries are not experiencing (Worley & Mohrman, 2014). Due to these changes, the health care organization selected is experiencing considerable industry and business challenges because of legislative changes and competitive pressures. In an effort to address these challenges and reach its full potential, the organization implemented a culture transformation in recent years. The organization utilized a top-down approach at the beginning of the culture transformation by engaging senior leaders to identify the culture values and training the top leaders to cascade the desired culture throughout the organization. This transformation has positively impacted the organization to date, and the organization continues to transform on a daily basis. However, because most organizational culture change efforts fail to meet their full potential, there was an opportunity for this study to provide support to continue the on-going transformation.

Assessing Current Situation – Culture Work to Date. The organization has implemented numerous actions to transform its culture to align with its business strategy:

1. Starting with a set of shared values to ground its culture across all businesses and departments;
2. Creating educational opportunities for all employees to share and understand the shared values;
3. Demonstrating the support of senior leadership by becoming leaders to facilitate the educational opportunities;
4. Creating an internal facilitator certification process for senior leaders to facilitate educational opportunities;
5. Developing a recognition and appreciation culture to reinforce cultural behaviors;
6. Embedding culture values and principles into performance management and feedback processes;
7. Aligning reward systems to validate the culture values;
8. Establishing a grass-roots change agent network;
9. Embedding culture values and principles into existing training programs;
10. Forming culture leadership teams to drive and support culture transformation across the organization;
11. Embedding culture values and principles into talent recruiting process; and
12. Measuring the effectiveness and commitment to the culture shift.

One of the purposes of this study was to identify and implement additional opportunities to support its on-going organizational culture transformation. The first step to achieve this was to identify the research opportunities and gain organizational support to move forward.

Identifying Organizational Research Opportunities. Because the organization is part of the health care industry, it is accustomed to conducting rigorous research utilizing data and experimentation to identify innovative solutions to improve the health care processes and products. Organizational senior leadership has an appetite for continuous improvement, which drives a willingness to encourage new ways of thinking and behaving to challenge the status quo, thus driving continuous improvement and innovation. Furthermore, the organization supports professional development through on-the-job learning opportunities, often building research opportunities into leadership development programs. As a result, when I approached senior leadership to conduct an action research project for my dissertation, they were highly supportive. They viewed this as an opportunity to conduct a research project in which the organization would benefit from new ideas and actions taken, while the participants would personally and professionally develop through interacting with other employees across the organization.

Gaining Organizational Support. Before initiating the research process, I secured organizational executive sponsorship through several discussions with senior leaders to gain support for the overall process. This was particularly important to guide topics and opportunities, as well as provide access to materials and team members. The overall executive sponsor for the research project was a Senior Vice President of Human Resources. The role of the executive sponsors was critical, with responsibilities that included: (a) providing input regarding the selection of team members; (b) providing guidance, support, and feedback to team members; and (c) helping overcome organizational obstacles (resources, time, and availability). Overall, the sponsorship role was critical, as the sponsors guided and supported the process and the success of this research study. Additional organizational executives were included throughout the research process to represent multiple areas within the business segment for varied perspectives, including Legal, Information Technology, Compliance, Human Capital, and Finance.

Step 2: Specify the Problem You Want to Study

The purpose of this action research study was two-fold: (a) to further the organization's on-going culture transformation and (b) to develop employees at a health care organization to better understand organizational culture and change management concepts to support this change and future changes. Many scholars highlighted the difficulty of large-scale organizational change, particularly organizational culture shifts in large organizations, are difficult to accomplish. Beer, Spector, and Eisenstat (1990) found that very little changed in organizations where strategies were "sold" to employees and followed up only with communication and implementation plans. Rather, successful companies leveraged employee involvement to identify and implement the desired behaviors and competencies to achieve their goals, leading to the preferred organizational culture.

Rachele (2012) noted that one of the best ways to achieve the preferred, long-term organizational culture change is to involve employees in the problem identification, analysis, and resolution through a participative approach such as action research. Moreno (2015) supported Rachele's suggestion, noting that "initiating a project is an opportunity to concretely alter reality through actions" (p. 178).

Identifying Organizational Opportunities through Employee Involvement. The focus of this study was to further the research regarding organizational culture change efforts through the use of employee involvement specifically in an organization experiencing competitive pressures, legislative changes, and uncertainties.

This action research project developed the employees and provided the opportunity for employees "to better themselves and to contribute to the development of the group or community" (Cleaver, 1999, p. 599). This participative research structure is key to employee development because "when people develop new skills and untapped expertise in the process of doing research, they have greater agency" (Ozanne & Saatcioglu, 2008, p. 424).

The practical significance of this project was to further the cultural transformation of an organization by creating culture experts across the organization, who are guided by project sponsors. The employee involvement in this type of research will help the long-term sustainability of the cultural transformation, as well as provide additional information to leadership that helps them understand and create the desired organizational culture, which can be a powerful capability to create competitive advantage.

The transformative aspects of action research called for the collective participation of the team members, in addition to the collective analysis of the power structures impacting the organizational processes. Participants had the opportunity to equal representation, participation, access, and management of the process. Knowledge was collectively constructed through a critical self-reflection process (Kemmis & McTaggart, 2008) within the team.

Step 3: Locate Resources to Help You Address the Problem

In action research, the team is an important vehicle for democratic decision making" (Bargal, 2008). Because of the importance of the team, identifying team members and forming as a team was key.

Forming the Action Research Team. The action research team was formed by identifying a representative group of participants to make the project participatory and meaningful for both the organization and the participants. These participants represented multiple areas and business segments across the organization to obtain a wide variety of perspectives. Participants were selected based on the following criteria:

1. represented one of two businesses to ensure wide representation of the organization;
2. represented functional and business subject matter experts to ensure inclusion of relevant stakeholders;
3. represented different grade levels within the organization;
4. included a combination of individual contributors and managers with direct reports;
5. based within the same geographic area to encourage face-to-face networking; and
6. represented diversity of the two businesses, including age, ethnicity, and gender.

The objective was to assemble a team that possessed both influential membership and cross-functional expertise to encourage feasible solutions for implementation. I wanted to promote an inclusive, energizing experience for the team participants, while at the same time furthering a highly engaging workplace for all employees. “Many managers and employees love challenges and seek new opportunities because they find them fulfilling, and sometimes downright fun. People should be excited and motivated by the challenges of their work” (McAllaster, 2004, p. 325).

I hoped that the research team members would be interested in and open to change and that they represented key diversity qualities: ethnicity, race, gender, seniority, grade level, function, and areas of expertise. “When possible, the membership of the group should be diverse so as to maximize various perspectives and to obtain fresh viewpoints” (Marquardt & Waddill, 2004, p. 191). I also hoped to create a high-performance team that demonstrated openness, non-defensive dialogue, mutual respect, and appreciation of diversity.

Revans (1980) noted that “the ultimate power of a successful [group] lies not in the brilliance of its individual members, but in the cross-fertilization of its collective abilities” (p. 8). This participatory perspective provided participants with the opportunity to construct meaning about their worlds and experiences and also offer a liberating means to address the realities within a complex organization. I was drawn to the transformative possibilities provided by the participation and collaboration of cross-functional employees, as it was the best way to obtain numerous, diverse perspectives from across the organization. “For a team to learn, its members need to attend and engage in dialogue on issues such as how its members communicate among themselves, solve problems, and make decisions” (Coghlan, 2002, p. 280).

Marquardt (1999, 2004) recommended a group size of 4-8 members from diverse backgrounds and/or parts of the organization as the action research team. Using this recommendation as guidance, the Culture Action Research Team (CART) consisted of the organizational insider researcher and seven employees representing numerous departments and diversity. I selected CART members to be change agents known as "those opinion leaders who are respected by their peers and who support the change effort and assist (the global and locals) in selling the change to other change recipients" (Armenakis, Brown, & Mehta, 2011; p. 308).

Participants selected had not worked together previously, as this was a highly diverse group representing numerous departments. Participation in this research would be a new experience for them to create relationships and partner to discuss opportunities, research best practices, implement actions, and analyze the results.

Participants' consent included their right to accept or decline participation in the study, and I explained that the research project was part of a study to earn a doctoral degree from the University of Minnesota. "Informed consent and the freedom to decline to be involved in the research are key ethical issues in insider action research" (Holian & Coghlan, 2013, p. 413). The consent form (see Appendix A) included the names and contact information of the researcher and the research advisor, in addition to aspects of confidentiality and limits to confidentiality with the research. Team members were provided time to ask questions and review the form prior to signing the consent form. Each team member signed the consent form and enthusiastically accepted the opportunity to participate in the research study.

Based on their willingness to participate in this research study, the team was comprised of eight employees, including the researcher. The team members represented two of the organization's businesses and several departments and functional areas. All employees were from different departments, with three of the team members being managers and five of the team members being individual contributors.

About five months into the project, one of the team members' employment was terminated by the organization due to a departmental reorganization and downsizing. This former employee returned to the organization in a different role after several months; however, I chose not to re-engage her on the team, as she needed to focus her attention on the new role. After that change, the team included the insider researcher and six members. Additional content owners and experts were contacted throughout the project, as the planning and implementation of this work was part of a larger system and could not be done in isolation. For example, we partnered with communications, creative teams, and human resources teams to align efforts across the organization.

I leveraged the theory of group development, which suggested a progression through the phases of inclusion, control, and intimacy. The inclusion phase involved helping employees "feel free, comfortable and able to contribute, while at the same time providing a sense of challenge and stimulation" (Wicks & Reason, 2009, p. 249). In the control phase, team members have confidence to challenge each other to explore and resolve differences as an effective group. The intimacy phase involves interdependence in which team members confirm their identity within the team (Srivastva, Obert, & Neilson, 1977; Wicks & Reason, 2009).

To engage the team members in the research study, a kick-off meeting was held on June 18, 2015. Key topics covered in the kick-off meeting included the following: overview of the project opportunity, team member introductions, team building and sharing, introduction to and overview or the action research process, overall project purpose and design, use of available organizational resources, project planning process, team member behavioral styles, expectations as team members, appreciation for participation, and expectations and preparation for the next meeting.

To get to know each other better and form as a team, we introduced ourselves and discussed team members' behavioral styles using the Senn-Delaney (2011) behavioral style framework, during the kick-off meeting. This framework was selected because it was a preferred company-supported culture tool that helps individuals and teams "understand the reality that we all see the world differently, and therefore, we all have a different approach to getting results" (Senn-Delaney, 2011, p. 36). According to the framework, most people fall within four major behavioral styles (see Table 5), with people inclined to have a single default style or home-base style. Each team member shared and discussed his/her behavioral style, his/her behaviors at work, strengths to leverage as a team member, and what this means as a team member.

Table 5

Behavioral Style Strengths and Style Tendencies

Behavioral Style	Strengths	If Overused
Controlling	Take charge, determined, decisive, results-oriented, efficient	Autocratic, insensitive, impatient, over-controlling, poor listening skills
Supporting	Team players, friendly, good listeners, relationship-oriented, conscientious	Too tolerant, unassertive, non-confronting, too driven to please
Promoting	Stimulating, goal-driven, enthusiastic, innovative, risk takers	Poor at planning, ego-driven, undisciplined, poor at follow-up
Analyzing	Thorough, detailed, rational, organized, good planners	Indecisive, too detailed, aloof, risk-averse, not intuitive

Senn-Delaney (2011, p. 39)

We compiled the overall team behavioral styles, noting that CART was comprised of team members representing three of the four behavioral styles (see Table 6). This exercise and the discussion of our behavioral styles provided a solid foundation for the group development process, particularly the inclusion phase to give them each a chance to participate. This process helped us to better understand each team member, how to work with and communicate with one another, team strengths, and potential team gaps or opportunities. More specifically, we learned that we needed to cover the one style missing from the team by partnering with others across the organization to provide the strengths of the "Analyzing" style, as this would be highly important during the data collection and analysis step. In particular, we needed to ensure that the data collection and analysis was very thorough and detailed, with solid rationale for planning and decision making.

Table 6

CART Behavioral Styles

Team Member	Behavioral Style
TM1	Promoting/Supporting
TM2	Controlling/Promoting/Supporting
TM3	Supporting
TM4	Supporting
TM5	Controlling
TM6	Controlling
TM7	Promoting
Researcher	Controlling

Conducting Ongoing Team Meetings. After the initial kick-off meeting, CART used "emergent design" to plan future CART meetings, meaning that each meeting was designed and planned based on what happened at the prior meetings, as well as between the meetings. Agendas were provided for the meetings to ensure that team members understood the topics in advance and would be prepared for the discussion. CART meetings allowed for progress updates and insight sharing between team members involved in different parts of the larger project. CART developed cohesiveness in a way that project goals and research could be revisited within the action research process.

Other employees were invited as guests to discuss current processes and practices from areas such as organizational training, recruiting, communications, and human resources. In total, CART met formally 22 times, for a total of 24 hours, with the last meeting occurring in July 2016. Appendix B details the meetings throughout the project. In addition to these scheduled meetings, CART members conducted research and met in smaller groups throughout the process.

Forming a Team-Based Learning Community. CART was created to further the organizational culture of two major businesses of a large organization, while providing personal and professional development opportunities. Throughout this research process, the team formed a learning community to emphasize peer consultation and share perspectives and expertise within the team, as well as with their immediate teams across the organization. During the discussions and analysis, CART members relied on their own problem-solving approaches and resources, rather than rely solely on solutions imposed upon them.

The learning community was established for CART members to experience a safe, supportive community that (a) gave priority to the creation of relationships and appropriate communications; (b) allowed team members to express perspectives and feelings without risk; (c) encouraged on-going personal and professional development; and (d) was open to numerous, diverse viewpoints from all team members. I was careful to support and model these expectations and behaviors by demonstrating positive regard, positive intent, listening, and empathy throughout the process.

To develop a strong team learning community, I incorporated three learning modes, which are naturally built into the action research process:

1. experiential – learning through hands-on research, analysis, project design, and implementation opportunities;
2. cognitive – learning through individual and team research, discussion, and problem solving; and
3. reflective/emotional – learning through examining and exploring organizational opportunities, with specific reflection as a team and as individuals, focused on personal and professional development.

The formation of this learning community supported the first two phases of group development – the inclusion phase and the control phase. Team members were able to equally contribute, while having the confidence to challenge one another.

Leveraging Organizational Information & Resources. Organizational groups and teams don't work in isolation; rather, they're parts of wider organizational systems that involve intergroup dynamics (Coghlan, 2002). "Doing action research in organizations requires attention to and working with the systemic interrelationships and dependence of each of the levels with one another" (Coghlan, 2002, p. 278). This interconnectedness was carefully leveraged to find, gather, and analyze organizational information and resources. Furthermore, we considered the impact of organizational politics by identifying the major stakeholders (training recruiting, human resources) in the organization and how they could get involved in the action research process (Brannick & Coghlan, 2007).

CART members participated in numerous discussions and brainstorming opportunities to identify and implement organizational opportunities and potential changes. However, the implementation of these changes required input and the expertise of additional organizational resources. In order to accomplish and implement changes, we realized that we were part of a larger system and available expertise and resources to create and implement changes. Consequently, additional meetings were conducted with additional resources to leverage their input and expertise (see Appendix C for meeting list).

Step 4: Identify Information You Need to Examine the Problem

As employees of the organization, each of the team members had his/her own experience and perspectives of the problems and the opportunities to support the cultural transformation. However, we couldn't rely solely on our experiences and feelings of the organizational issues. To gain support to implement change, gathered solid data to guide our decisions and plans for change. My role as an insider action researcher was key to identify the pertinent information to examine the problem.

Using Participant-Led Inquiry to Identify Organizational Opportunities. The focus of this research was to support the on-going culture transformation in a large organization. In order to discuss the current problem and the potential opportunities, team members discussed their concerns based on their experiences, perspectives, and feedback from their teams and leadership; this resulted in a list of opportunities:

1. New employee experience (including onboarding and orientation);
2. External recruitment of new employees;
3. Internal recruitment and movement of employees;
4. Manager toolkits to support culture transformation;
5. Best practice research and subsequent manager communications;
6. Creation of affinity groups to support employee interests;
7. Benefits communication to educate employees; and
8. Real estate opportunities to visibly support culture through specific values-based artifacts (i.e., signage, photos).

Step 5: Implement the Data Collection

Because so much data was available within the organization, the key was to focus on a data collection process that was thoughtful, deliberate, and planned (see Table 3). "A good data collection plan will help participants think through important questions for data gathering, facilitate coordination of resources and timelines so that data are gathered by design rather than by chance, and bring clarity so that data are collected right the first time" (Pine, 2009, p. 251).

Data collection was important to understand the current organizational situation and needs to ultimately influence decisions and create action plans. Questioning was crucial because it is considered the most effective tool to understand complex problems, to develop innovative strategies, to build team cohesiveness, and to develop the team members' leadership skills (Marquardt, Leonard, Freedman, & Hill, 2009; Sofo, Yeo, & Villafane, 2010). Because of the importance of deliberate data collection, numerous data gathering methods were used and multiple sources of information identified.

Leveraging Multiple Methods to Gather Data. Data gathering occured in numerous ways. Considering the diverse team members, varied methods were used at CART meetings to engage and encourage participation and sharing:

1. Appreciative Inquiry. Appreciative inquiry focuses on what individuals and organizations are doing well, rather than focusing on deficiencies. Appreciative inquiry "provides a powerful and guiding image of what the organization could be" (Worley & Mohrman, 2014, p. 216). CART members engaged in dialogue such as when they experienced positive culture or an engaging workplace during a process.
2. Reflective Practice. Meetings included time for group observation and discussion to promote self-awareness. Participants were provided time for reflection and encouraged to reflect on lessons learned throughout the process. Also, participants were asked twice to share feedback about their experience and their lessons learned.
3. Data-Action Cycles. CART participants discussed the meaning of data regarding several themes, how the data resonated with them, and prioritization of the themes for the team. CART participants developed action plans based on this data discussion.
4. Benchmarking Best Practices. CART participants researched local large companies and journal articles to identify best practices. These were

discussed by CART members to determine applicability and opportunities to incorporate into next steps.

5. Focus on Organizational Culture. Topics discussed at CART meetings included organizational culture best practices, current organizational processes and practices, and desired organizational culture behaviors.
6. Focus on Change Management. Topics discussed at CART meetings included organizational change management, implementing change, and the change agent role.

Researching Organizational Opportunities. The team organized into subgroups focusing on one or two of the eight suggested topics, as noted previously on page 91. In these subgroups, team members researched information, compiled the data, and presented their findings at CART meetings. Based on this information, we identified the top three options for further research, considering the organizational need for change, senior leadership feedback, ability to scope and implement project(s) in a timely way, internal political considerations, and area of influence or control:

1. New employee experience (including onboarding and orientation);
2. Internal recruitment and movement of employees; and
3. Real estate opportunities to visibly support culture through specific values-based artifacts.

Focusing on One Opportunity. After researching and discussing the three options, we chose to focus on one project to realistically implement a change - the new employee experience, as it was considered a high-value project that would impact a high number of people and demonstrate the organizational culture early in an employee's career.

Organizational culture and the new employee experience needed to be highly aligned, as prospective employees "may be attracted or organizations that they perceive as having values similar to their own" (Barnes et al., 2006, p. 258). "Corporate culture has an important role in building employer brand, which is reinforced by employees who join a company because they are attracted by it, helping to increase productivity" (Ortega-Parra & Sastre-Castillo, 2013, p. 1073). "Values provide the starting point, with the joint processes of selection and socialization acting as complementary means to insure person-organization fit" (O'Reilly, Chatman, & Caldwell, 1991, p. 492). As a result, many companies are trying to update their culture to relate to these new employees, but "moving from words to action is a different issue" (Ortega-Parra & Sastre-Castillo, 2013, p. 1073).

We chose to focus on this one project because it was highly needed, could be implemented within a reasonable timeframe, and could be implemented by utilizing current organizational internal resources. According to action research guidelines, a good research topic "is focused and not so ambitious, big, or complex that it requires extraordinary resources, time, and energy" (Pine, 2009, p. 239). Furthermore, it leads to taking an action, to trying something different, to improving a situation, and implementing actions that can make a difference in an organization (Pine, 2009).

New Employee Experience Data Collection. After the team chose to focus its efforts on the new employee experience, the team gathered data to understand the current situation and improvement opportunities. We identified the need for data in eight different categories:

1. External best practices - strong onboarding and orientation practices that potentially could be leveraged within a large organization;
2. Internal best practices - great onboarding and orientation practices and materials already built and supported within the organization;
3. Internal hiring data - the number of employees hired within the two businesses, number of telecommuters, number of employees hired into field locations, and number of employees hired into the headquarters location;
4. Current new employee process, including communication and onboarding;
5. Feedback from 2015 new employees - their personal experiences and opportunities for change;
6. Feedback from 2015 hiring managers – their perspectives on the onboarding process;
7. Feedback from 2015 business liaisons - their role in the onboarding process;
8. Senior leader interviews – their perspectives of opportunities and priorities.

External Best Practices. We looked externally to determine what was happening in other businesses and industries. The team researched numerous large companies to identify external best practices for onboarding and orientation of new employees. Additionally, the team researched and shared best practice articles and news about local companies' practices. The best practices included:

1. Communicate with the new employee shortly before their start date;
2. Create a plan for the new employee's first week;

3. Ensure tools are readily available and/or set up for the new employee (computer, phone, supplies);
4. Provide a personalized Day 1 experience to confirm decision to join organization;
5. Block time for the new employee and manager to meet throughout the first week;
6. Identify a buddy for the new employee to ask questions to better understand the organization for the first few months;
7. Provide time for training and job shadowing during the first 30-60 days;
8. Build in opportunities for feedback for the new employee from the manager and peers to support a feedback culture; and
9. Determine measures of success for orienting new employees.

Internal Best Practices. We looked inward by researching the internal programs, processes, and best practices across the large organization. When doing this research, the team realized there are numerous versions and processes across the organization due to the lack of standardization; however, the internal best practices could be categorized into major areas:

1. Preparation/Readiness – availability of tools and resources on Day 1;
2. Warm Welcome – making the first day special (introductions, tours);
3. Helpful Resources/Links – providing overview of available resources;
4. Company Information– giving the new employee company information; and
5. Department Information – giving the new employee departmental information and how his/her role fits within the department and the overall organization

Internal Hiring Data. To understand the current organizational hiring scenario, we requested company information regarding the numbers of employees hired during 2015 to identify how many were hired in office locations or as telecommuters. Table 7 details the 2015 hiring of these types of employees, compared to the current types of employees for the two businesses.

Table 7

Organizational Office Employees and Telecommuters

	2015 New Hires – Office Locations	2015 New Hires - Telecommuters	Current Total Employees - Office Locations	Current Total Telecommuters
Business 1	76%	24%	55%	45%
Business 2	79%	21%	74%	26%

The team gathered information from the organizational human resources team responsible for hiring and onboarding new employees. Information included the current recruiting process, organizational information on external websites, interviewing questions and process, communication with hiring managers, and communication with new hires. Information gathered from other parts of the organization included processes and programs currently in place within specific teams or departments.

Current New Employee Process. Currently, there are varying ways to welcome new employees to the organization. Some groups have extensive, highly structured onboarding and orientation programs, while other departments have little to nothing established for new employees. Reasons for these differences across the organization range from the leadership driving onboarding within each group to the maturity of the department to the passion and support of the administrative assistant or business liaison. Whatever the reason, the overarching thread was the lack of continuity in welcoming new employees to the organization.

Currently the only similar process is through the organization's human resources department, which provides the employment offer letter and the "logistics" letter providing numerous details such as how to get started, their employee number, how to access the system, chat and voice functionality, self-service information, printer features, and how to entire time in the system, etc. While the communications during this process are personalized, the feelings generated are not warm and welcoming. As a result, the team determined there was an opportunity to supplement the human resources communications with additional communications that (a) provided a warm welcome and (b) engaged the employee to feel connected more quickly with the organization.

Feedback from 2015 New Employees, Hiring Managers, and Business Liaisons. To best understand the current situation on onboarding and orientation practices, the new employee experience project required feedback from 2015 new employees, hiring managers, and business liaisons. This feedback could be gathered in numerous ways, possibly through surveys or interviews. The organization already conducts numerous surveys, so we decided the best way to gather this feedback was through focus group interviews with different groups (new employees, hiring managers, and business liaisons) to ensure no confusion with other data gathering sources.

As a result, nine virtual focus groups were organized and conducted with the three distinct employee groups – new employees, hiring managers, and business liaisons. Participants were selected using purposeful sampling to represent numerous departments and locations. Focus groups were organized according to Business 1 or 2 and locations (office, field, or telecommuters). We used a purposeful sampling method to identify participants for the focus groups. Specifically, participants were selected to represent diverse geographic areas, office locations, grade levels, roles, and departments. Using purposeful sampling ensured representation across the organization to gather organization-wide data.

To prepare to conduct the focus group discussions, we established a sub-team to focus on the process, the focus, the question development, and our assumptions and biases. The CART member sub-team led the focus group discussions using open-ended echo questions to generate insights into employee perspectives and experiences. These echo questions are open questions that are "designed to identify individuals' values and beliefs through an open, confidential method of questioning" (Twiname, 2008, p. 154). See Appendix D, E, & F for focus group questions for each target group.

To document the focus group conversations, we utilized two scribes (my administrative assistant and myself) capturing their conversations without recording the conversation or the participants' names (to provide a level of confidentiality). Tape recording employees' conversations was not allowed according to the organization's policy, so we adapted by having two scribes capture the information and compile the data to ensure that we caught the information. Throughout the focus groups, I occasionally asked questions to clarify information or to probe for further detail. This was limited, however, as I wanted the CART members to take the lead on the focus group facilitation to establish themselves as the facilitators and to develop their skills as facilitators, including how to ask questions and to be flexible to pivot to other topics if needed.

Participant responses were reviewed, categorized, and sorted by the CART member sub-team. In consultation with the CART member subteam, I compiled the data and shared it with senior leadership and the remaining CART members. See Step 6 for the specific, overall themes identified from the focus groups.

Annual Employee Engagement Survey Review. We gathered data from the 2015 annual employee survey, which included quantitative and qualitive information; however, none of the quantitative questions focused on the new employee experience or onboarding, so we focused on the qualitative write-in comments. I requested the survey comments that specifically addressed orientation, onboarding, and new employee experience. I reviewed and analyzed 292 comments, categorizing them into eight different themes (see Step 6 for the survey themes).

Senior Leader Interviews.

Several senior leaders, including leaders within human resources, the culture department, and the businesses noted the importance of updating our new employee experience process. Leaders provided feedback during discussions at leadership meetings; additionally, I interviewed three senior leaders to obtain specific information from their respective departments. During the interviews, I asked the following questions:

1. Why update our new employee experience?
2. Who is instrumental in the new employee experience?
3. What should be included in the update of our new employee experience process?

In particular, they highlighted the need to update this experience due to: (a) the need for strong employees to drive and lead our business during challenging times, (b) the dispersion and diversity of our employees (whether at office locations or as virtual telecommuters), and (c) the continuous competitive and organizational challenges with on-going acquisitions within the healthcare industry. The senior leaders provided feedback in three main categories:

1. Determining the start date of the new employee experience. The new employee experience starts before day 1 as a new employee - the experience starts during the recruiting process, so we needed to ensure that our culture values were demonstrated during that process;
2. Understanding a large, complex organization. The matrix organization may sometimes be difficult to maneuver, so employees need to understand the business and the structure to encourage collaboration across the organization; and
3. Creating a warm welcome. Because the organization is large and potentially overwhelming, the process needed to focus on the new employee and make it a more welcoming experience.

Step 6: Analyze the Data

The goal of action research is positive change; the team analyzed the data to identify specific opportunities that would support the culture transformation through an improved new employee experience process. "An accurate diagnosis can help them focus energy and investment in building cultural mechanisms that meet the critical organizational needs" (Zheng, Qu, & Yang, 2009, p. 154). Johnson (2008) suggested looking for themes, categories, or patterns that emerged during the data analysis process. To identify these themes or patterns, we leveraged triangulation, a powerful technique that facilitates the validation of data through the cross verification from at least two sources. For example, the team triangulated the feedback received through the focus group interviews with the employee survey comments. Additionally, the team analyzed the internal and external best practices research in conjunction with the senior leader interviews.

External Best Practices. Current new employee experience practices were gathered from five large organizations within the Midwest. These practices were discussed, noting the pros and cons of each practice and how each practice could be integrated into the new employee experience; we identified several best practices to guide the new employee experience project:

1. Provide company information and orientation to new employees in a phased, bite-sized approach, rather than through sequential days or all at once;
2. Establish warm, personal interaction during the first month is key to engage the employees quickly and in a way that confirms their choice to join the organization;
3. Provide overarching company-wide information to ensure the new employee understands the company and where he/she fits into the organization;
4. Ensure understanding of organization's mission to establish connection point and reinforce purpose of and pride in the organization; and
5. Provide a connection to the leaders within the organization through various communications (i.e., blog, photos, organizational charts, videos).

Internal Best Practices. Conducting internal best practice research was crucial, as we developed an increased understanding of the problem, including the many components from different perspectives across the organization. For example, we learned that many departments and functions within the organization have established their own onboarding and orientation programs to welcome new employees, since the organization lacked a centralized onboarding process that was viewed as a welcoming process. As a result, many employees created improved processes to welcome employees to the growing organization. While the purpose of the new employee experience program is not to replace all these programs, the team reviewed six different internal onboarding programs and identified several best practices that could be leveraged for the recommended new employee experience:

1. Personalized communication to the new employee from senior leadership;
2. A list of helpful resources for all new employees on a company-wide basis;
3. Internal links to most used sites or information on a company-wide basis;
4. Organizational charts to better understand the department and the overall company;
5. A list of acronyms used within company or industry; and
6. Departmental buddy to provide guidance and support in an informal, safe way.

Internal Hiring Data. To understand the 2015 hiring scenario, we requested information regarding the numbers of employees hired, noting how many were hired in office locations or as telecommuters. Table 8 details this information.

Table 8

New Hire Data - Organizational Office Employees and Telecommuters

	2015 New Hires – Office Locations	2015 New Hires – Telecommuters
Business 1	8,513	2,733
Business 2	295	78

We analyzed the hiring data and were surprised that the organization hires over 20% telecommuters. Because of the high number of telecommuters and the many different office locations, we needed to develop an experience that would resonate for both telecommuters and employees in office locations. As a result, the experience could not be an in-person program due to geographic restrictions and budget constraints.

Feedback from Focus Groups, Employee Survey, and Senior Leaders. We gathered feedback from employees through archival data (annual survey) and new data (focus groups and senior leader interviews) that were reviewed and categorized into several themes (see Table 9 for survey feedback themes).

We shared the focus group data and survey information with several senior leaders who were very interested in these perspectives; these data points guided the senior leaders to provide additional helpful input and direction for the project. The team discussed this senior leader feedback and potential opportunities to address their specific comments (see Table 9 for senior leader input).

Table 9

Feedback from Focus Groups, Annual Survey, and Senior Leader Input

Focus Group Themes	Annual Survey Themes	Senior Leader Input
Business Knowledge – new employees want to understanding our organization, businesses, and how we make money	Finding Information - too many, overwhelming	Help employees understand the complex organization and matrix
Organizational Structure – new employees are interested in learning more about our organizational structure and our senior leadership teams	Lack of resources about company - hierarchy, culture	Provide a warm, welcoming experience for new employees to experience our culture
Company Orientation – new employees would like an in-depth review of our benefits and total rewards package	Too self-service oriented; lacks a personalized, human touch	New employee experience starts before day 1
Culture Information within Interview Process – new employees want more information about the culture change before they join the organization	Buddy system – align new employees with current employees to help onboard and train	Provide help to find information (links, tools)
Technology & Equipment Support – new employees want timely equipment access and set-up	Equipment or system access – sometimes don't have access for days	
Standardized Onboarding Approach – new employees want a similar onboarding experience	Provide formal training on a consistent basis across the organization	
	Streamline onboarding – appears to be disorganized in some groups	
	Standardized process or elements – different process across different departments	

Sharing Information Across the Organization. After analyzing the data, we shared and discussed the findings with several organizational groups: (a) Senior Leadership; (b) Business 1 Human Resources; (c) Business 2 Human Resources; (d) Legal – Employment Law; (e) Legal – Intellectual Property; (f) Employee Relations;

(g) Recruiting and (h) Learning and Development. These discussions were valuable, as they provided additional insights regarding the process, the conclusions, the team's recommendations, and the next steps. Furthermore, it provided an opportunity for the team to build credibility through the research conducted and the recommended action plan.

Step 7: Develop a Plan for Action

The advantage of action research is that it "provides a process by which changes can be introduced, evaluated, and refined in a practical setting" (Greenbank, 2013, p. 147). The planning and execution of the change process is critical, as numerous researchers postulated shortcomings in planning and execution that result in the failure of many change initiatives (Burnes & Jackson, 2011; Burnes & Weekes, 1989; Dent & Goldberg, 1999; Hoag, Ritschard, & Cooper, 2002; Huczynski & Buchanan, 2001). Adding a layer of complexity to this change initiative, "culture change can be difficult to implement because values and beliefs are hard to modify" (Heckelman, Unger, & Garafano, 2013, p. 26). Furthermore, to ensure that changes will last, Heckelman et al. highlighted the need to implement changes at three organizational levels (organization, team, and individual) and consider the potential risks and barriers to success.

We leveraged the data gathered and analyzed to create an action plan. "Designing involves developing the action plans that will diffuse and strengthen the positive behaviors, and destiny describes processes for making the vision real" (Worley & Mohrman, 2014, p. 216). According to Creswell (2005), the action plan should be a specific, tangible approach to trying out new ideas as a way to solve the original problem.

The team discussed the research questions and determined that the new employee experience project was a highly needed, practical approach to support the organization's on-going culture transformation for several reasons:

- The study engaged senior leaders, middle managers, organizational change agents, and departments throughout the process;
- The research process demonstrated the importance of collaboration and relationships to build and implement a plan (through working with numerous departments & functions);
- The study focused on the new employee population to help build/further the culture transformation by educating and communicating to the new employee population immediately when they joined the organization; and
- The process engaged current employees to reach out and welcome new employees and demonstrated the desired culture through behaviors.

Leverage Internal Resources. To develop the action plan, we established partnerships with internal departments to leverage their knowledge and expertise, including internal-focused communications, creative communications and marketing, talent recruiting, organizational training, total rewards, employee relations, and legal. We discussed existing programs and best practices to avoid duplication of effort and implementing multiple changes to the same change problem. Based on these partnerships and their feedback, we created a three-phase action plan (see Table 10) to support the organizational culture change.

Table 10

New Employee Experience Project Phases

Phase 1 - Communications	Phase 2 – Videos	Phase 3 – New Employee Participation
Pre-employment: Culture & Employer Value Proposition within Interviewing Process	First 30 days: Company overview (businesses, total rewards)	Invitation to participate in Welcome Crew
Pre-employment: Communications from Hiring Manager	First 60 days – Video from Senior Leadership (Culture & Employment Focus)	
Day 1: Welcome letter from Senior Leadership	First 60 days – Video from (a) new employees and (b) experienced employees (Culture & Employment Focus)	
Day 2/3: Important information from Human Resources		
Within first 2 weeks: Welcome messages from current employees/change agents		

Due to the complexity of each phase, CART focused on the Phase 1 action plan for the new employee experience initiative (see Table 11 for the phase 1 action plan). By implementing one phase at a time, the team could generate short-term wins, which is one of the changes in Kotter's (1996) eight-stage change process. This is particularly important in large-scale change implementation, as "short-term wins help to demonstrate the viability of change and to build momentum" (Pollack & Pollack, 2015, p. 59).

Table 11

New Employee Experience Initiative Components – Phase 1

Timing	Action	Audience	Purpose	Emotion(s) Generated
7 days prior to new employee start date	Message to Hiring Manager	Hiring Manager	To provide checklist for hiring and onboarding new employee	Support and Relief to have a checklist to follow
7 – 10 days prior to new employee start date	Message from Hiring Manager	New Employee	To reaffirm employee's choice to start with organization	Gratitude and excitement for new job
Week 1	Welcome letter from Sr. Leadership	New Employee	To welcome new employees and provide information to access Sr. Leader blog and social responsibility	Excitement to be part of the organization
Week 1	Senior Leaders Human Resources Message	New Sr. Leaders	To provide information for senior leaders and invitation to participate in Onboarding Sessions	Sense of belonging within a group
Within first 30 Days	Welcome Messages from Employees	New Employee	To welcome new employee through messages from 5 employees	Reinforcement of decision to join company

CART partnered with communications to review internal and external best practices and created materials for Phase 1. We leveraged the concept of including links to organizational intranet information, as Bennett (2014) demonstrated the value in this approach. Bennett (2014) conducted case study research to determine how the intranet provide opportunities for adults to learn organizational culture, and she concluded that the intranet "provided cultural learning opportunities through members (a) experiencing the wider organization, (b) recognizing and rewarding performance, (c) reinforcing organizational expectations, and (d) modeling corporate communication style" (p. 307).

Bennett (2014) found that "it is possible for intranets to provide opportunities for members to learn the culture of an organization when they see patterns of precedence that help them make sense of their environment over time and to understand how performance is valued" (Bennett, 2014, p. 312). Bennett (2014) concluded that "cultural knowledge is conveyed and renewed through the intranet" (p. 312).

Communicating the Action Plan. Having developed the plan, we presented the findings and the recommended plan to the Executive Sponsors and to Senior Human Resources Leadership. Sharing the findings and the plan with leaders helped the team reflect on the process and the problem, in addition to understanding improvement opportunities. These senior leaders provided thoughtful feedback regarding the objectives, the communications, and the possible follow-up opportunities.

Researchers noted that communication is vital to the successful implementation of organizational change (Allen, Jimmieson, Bordia, & Irmer, 2007; Armenakis et al., 1993; DiFonzo & Bordia, 1998: Petrou, Demerouti, & Schaufeli, 2016). "The empirical picture that is slowly emerging indicates that communication process and organization change implementation are inextricably linked processes" (Lewis, 1999, p. 44). "Organizations do not change through automation. Rather, change is implemented and sustained through human communication" (Russ, 2008). "In particular, at the individual level, appropriate communication has been identified as a significant factor in helping employees understand both the need for change, and the personal effects of the proposed change" (Goodman & Truss, 2004, p. 217). Because of the need for communications to support implementation, Russ (2008) proposed two approaches to communicating change in organizations – participatory communication and programmatic change communication.

Participatory Communication. Participatory approaches "invite input, using involving and empowering methods to gain the insights of various stakeholders to shape the change programme" (Russ, 2008, p. 204). Participatory approaches are grounded in the assumption that stakeholders should have input and be active in the change process, as they can be catalysts for implementing and sustaining change (Lines, 2004). Examples of participatory communication approaches include formal and informal meetings with feedback and idea exchange, working groups and project teams, focus groups, feedback surveys, and suggestion opportunities or boxes. "The core objective of participatory communication activities is to build consensus among relevant stakeholders by fostering their involvement and soliciting their ideas and input" (Russ, 2008, p. 205).

Participatory communication has both limitations and benefits. Limitations of participatory approaches include: (1) participatory approaches can create ambiguity in which the change purpose gets lost because of the need for participation; (2) some participatory efforts are viewed as insincere when participation attempts are for only symbolic purposes with no interest in participant feedback; (3) participatory approaches exhibit low efficiency, requiring a great deal of investment of organizational resources; and (4) participatory approaches assume that most people want to be involved, while some people don't like participating in the change process which may hinder the progress of the change implementation. Benefits of participatory approaches include (1) providing the opportunity for employees to have a seat at the table, to have greater accessibility to information, and to have input in decision-making; and (2) bringing leaders and employees together to develop the change together through a participative, collaborative process that discusses opportunities and challenges (Lines, 2004; Ruben et al., 2007).

The action research process was highly participatory to discuss the opportunities, gather and analyze feedback and data, create the action plan for implementation, develop the creative theme and communications plan, implement the action plan, evaluate the results, and recommend next steps. Table 12 details the plan to engage numerous groups and employees across the organization through a participatory approach. Communicating with these employees was key, as next to the managers' role in clearly communicating organizational change, the role of employees in successful adaptation to organization change becomes critical (Petrou, Demerouti, & Schaufeli, 2016).

Table 12

Participatory Communications Action Plan

Target Group	Population Size	Participatory Vehicle
CART Members	8	Data gathering and analysis, action planning, implementation, reflection
New Employees (2015)	32	Focus group feedback
Hiring Managers (2015)	20	Focus group feedback
Business Liaisons	10	Focus group feedback
Recruiting	5	Discussion alignment with recruiting practices an processes
Training	4	Discussion alignment with organizational training programs
Internal Communications	3	Development of materials
Senior Leadership	4	Review and feedback
Creative team	3	Development of creative themes and materials
TOTAL	89	

Programmatic Communication. Programmatic approaches are focused on "telling and selling" (Russ, 2008, p. 200), emphasizing top-down distribution and delivery to sell employees the reason to be committed to implementation (Armenakis & Harris, 2002). Programmatic communication utilizes highly centralized and controlled approaches to change implementation, with little to no organizational participation. Examples of programmatic communication include presentations, memos, meetings, brochures, posted information, videos, and websites. "While implementers most commonly use programmatic approaches to bring about planned organizational change (Nutt, 1986; Lewis, 1999), they are deemed less effective by implementers (Nutt, 1987) and stakeholders (Lewis, 2006) than participatory approaches" (Russ, 2008, p. 202).

Programmatic communication approaches have limitations and benefits. The limitations of programmatic approaches include: (a) programmatic communication is one-way, while organizational change is not one-way and (b) programmatic communication is disseminated in a downward didactic manner which may disengage people and doesn't build consensus or foster employee engagement during the process. The benefits of programmatic communication include (a) the value of communication from organizational leadership to increase understanding of the organizational change and to reduce anxiety by explaining the change; (b) the creation of the perception that information was provided to all appropriate stakeholders; and (c) the perspective of highly efficient communication that is quick and inexpensive to disseminate.

We discussed the major target groups to communicate to in advance of the project roll-out, as well as immediately after the project roll-out. Table 13 details the programmatic communications action plan, which followed a formal implementation cascade, starting with senior leadership as recommended by Heckelman, Unger, & Garofano (2013). The communications included standardized information to ensure consistency across the organization, with minimal customization for the stakeholders "to help improve the reception of new messages and overall adoption of changes" (Heckelman, Unger, & Garofano, 213, p. 29).

Table 13

Programmatic Communications Action Plan

Target Group	Population Size	Message(s)
Senior Human Resources Leaders	4	Overview of new process, request for support
Senior Leadership	80	Overview of new process request for support
Culture Leadership Teams	23	Overview of new process, Request for support, Thank you for sponsorship
Human Resources Community	86	Overview of new process, Request for support and feedback
Internal Communications Community	53	Overview of new process, Thank you for expertise
Recruiting Senior Leadership	14	Overview of new process, Thank you for expertise & partnership
Training Senior Leadership	8	Overview of new process, Thank you for expertise & partnership
Employee Relations Senior Leadership	10	Overview of new process
Welcome Crew	700	Overview of new process, Thank you for volunteering
Culture Change Agents	2,358	Overview of new process
Local Employee Engagement Team	30	Overview of new process
TOTAL	3,366	

Development of Communications. "Organizational change efforts are often framed as communicative challenges in which various forms of information exchange are necessary for managing uncertainties associated with change (e.g. Allen, Jimmieson, Bordia, & Irmer, 2007; Russ, 2008)" (McClellan, 2014, p. 192). Perceptions can either support or impede the effectiveness of a change intervention (Armenakis, Harris, & Mossholder, 1993; Maheshwari & Vohra, 2015). This is why it was extremely important to communicate clearly about the updated program, its objectives, the program materials, the timeline, and the phased implementation plan. I worked with my internal communications partners and we established several principles for the communications to stakeholders (see Appendix J for an example of communications):

1. Be clear about what is changing and why for the stakeholders;
2. Tell employees how they can support the new program;
3. Explain the research and the process to develop an updated program;
4. Share the timeline and the materials developed to date;
5. Encourage a feedback loop or two-way communications for questions and process improvement;
6. Use a variety of communication vehicles to communicate and reinforce the updated program – e-mail memos, meetings, blogs, etc.;
7. Target the communications for the different groups to ensure clear, customized communications; and
8. Monitor the progress of the roll-out and provide updated communications on a regular basis to reinforce phase 1 and ready the organization for phase 2.

Step 8: Implement the Plan and Reflect

Before implementing the plan to address the research questions, we made sure that the plan was focused enough in order to be realistically addressed through the actions and it was focused on what the team could actually implement and control within a realistic timeline. "Institutionalization of change involves making a particular change a permanent part of the organization's structures and systems so that the benefits of successful change persist over time" (Torraco, 2005, p. 305).

Reflective practice teaches people to think critically in order to identify hidden meanings, to surface any hidden assumptions, and to make connections between complex issues and opportunities (Argyris & Schön, 1996; Sofo, Yeo, & Villafane, 2010). "Improved reflective inquiry makes a practical difference in the workplace where it is given an opportunity to affect work practices" (Sofo, Yeo, & Villafane, 2010, p. 212).

Implementing the Plan. Implementation is a highly critical phase of change management (Armenakis et al., 1993; Armenakis & Harris, 2002; By, 2005, 2007; Allen et al., 2007; By, Diefenbach, & Klarner, 2008; Lines, 2007). Several researchers noted the importance of implementation, noting that the low success rate of organizational change is often due to implementation problems, rather than the change itself (Armenakis & Harris, 2009; Klein & Sorra, 1996; Kotter, 1995; Pollack & Pollack, 2015; Rogiest, Segers, & van Witteloostuijn, 2015). Heckelman, Unger, & Garofano (2013) noted that "culture change requires a planned and disciplined implementation cascade" (p. 25).

After months of best practice research, analysis, and planning, we developed a three-phase plan (see Table 12), implementing Phase 1 of the New Employee Experience project in June 2016. Pollack and Pollack (2015) noted that "it is arguably [action research] AR, rather than literature reviews or post hoc analyses, that have the greater potential to contribute to improved execution" (p. 52). In order to get to this point, the team had numerous discussions regarding the best practices of external organizations and internal departments, recommended changes to the current situation, resource needs to accomplish the goal, and why this project is important to the overall organizational culture transformation. Based on the many discussions as an action research team, we established five principles when developing and implementing the plan:

1. Balance the need for the digital, self-service world with the personal touch;
2. Leverage Human Resources as the steward of first impressions for job candidates and ongoing satisfaction for existing employees, with an opportunity to position our company that we're leaders in this space;
3. Build on first-day excitement by accelerating the onboarding process;
4. Provide visibility to the larger organization in a personalized way; and
5. Partner with other internal experts to ensure alignment with other processes and programs across the organization.

The team chose to implement the change in a phased approach to manage the changes in smaller, manageable phases to gain success and gather feedback before moving on to the next phase. This was a way to balance the long-term needs of overhauling the entire new employee experience with the short-term needs to create and celebrate small wins along the way. Additionally, the materials created and distributed in phase 1 were written documents, including executive memos and a checklist, while the material proposed in phase 2 were video materials. The team needed to work with different internal and external resources for the first two phases, so it was practical for the team to implement phase 1 and reflect on the creation and implementation of the phase 1 experience before moving to phase 2 .

Creating the Overall Creative Theme. To create a comprehensive, recognizable new employee experience campaign, I worked with communications and the company's creative team to develop a memorable theme for the materials and overall project. After discussing how we wanted new employees to feel when they joined the organization, we brainstormed ideas. Based on the desired emotions and the brainstormed ideas, the creative team developed four different themes for review. My communications partner and I discussed the options and further narrowed it down to two options.

We reviewed these two options and recommended that we pursue the theme "happy you're here" as the overall theme to establish a warm welcome and set a positive, conversational tone for new employees. CART members also showed this theme to other employees and received positive feedback, which confirmed the team's choice. As a result, we moved forward with the "happy you're here" theme and the creative team developed versions of the requested communications. We partnered with other internal departments such as recruiting, learning and development, and social responsibility to capture information they would like to immediately share with new employees. After numerous discussions, several versions were created, which were reviewed and edited numerous times prior to finalizing the materials (see Appendix L).

Coordinating the Logistics and Implementation. The new employee experience plan included several e-mail communications to be distributed at different times of a new employee's tenure during phase 1. Due to the high number of employees joining the organization, this would not be efficient if distributed manually. Rather, the team needed to determine an efficient, automated way to distribute the timely e-mail communications. We had discussions with several people in the organization within two departments (data analytics and recruiting) to determine the best process and finally landed on a solution to pilot the implementation plan. However, the distribution of the communications is one of the elements that needs to continuously be monitored to ensure adherence to the plan. Furthermore, since additional elements will be added in future phases of the program, an efficient distribution plan needed to be established and monitored.

Establishing the Welcome Crew. Employee involvement pays a crucial role in the success of organizational change efforts. One of the identified internal best practices to engage employees was to create a team of volunteers to welcome new employees to the organization on a regular basis. "While it is important for leaders to involve employees under normal circumstances, it is even more critical to involve them during an organizational change, particularly when that change has an impact on the underlying culture of the organization" (Burt, 2011, p. 5).

CART discussed having five different employees welcome each new employee to the organization within their first few weeks of employment. Also, we estimated that each volunteer would welcome five different employees to the organization monthly. Based on estimated hiring for 2016, we needed about 800 volunteers to participate in the program to meet the requirements.

I sent a request to a group of employees within Business 1 who are considered culture change agents (See Appendix K for communications). I was extremely pleased with the response, as we had almost 700 employees volunteer within the first week (with only 35 employees specifically opting out). This was a great sign that employees were supportive of an updated new employee experience program and willing to participate by welcoming new employees. This was a positive experience and reflective of the culture created to date, as "people will go to extraordinary lengths when the pride and respect of their organization is important, and such considerations are a major part of the culture" (McAllaster, 2004, p. 318). In addition to them volunteering for the opportunity, I received many positive responses when accepting the opportunity, including:

> *"What a great program! Busy schedule yet would like to assist in a limited way."*
>
> *"I would be more than happy to help."*
>
> *"What a great program would love to help out."*
>
> *"I am actually a new employee as well, finishing up my fourth week today. I think this is a great idea to help bring new employees into the culture! To be able to feel that warm welcome on a personal level when you first come in to the business will add to the employee's comfort in knowing they made the right decision!"*
>
> *"I'm a WAH employee but would love to help new employees feel more welcomed to the company. Great idea!"*
>
> *"I think this is a great idea and excited to be a part of it."*
>
> *"I'd love the opportunity to connect with new employees."*
>
> *"What a great initiative! Happy to help!"*
>
> *"Sounds great, count me in."*
>
> *"I wish we had this when I first started"*
>
> *"Fantastic idea. I love it!! Resoundingly yes!!"*
>
> *"I am very, very interested in this opportunity! I think it is a fantastic idea!"*
>
> *"I am so glad – this is long overdue. Thank you."*

In addition to these culture change agents accepting the opportunity, I introduced the new employee experience opportunity to the senior leadership team and requested their help, as well, on a monthly basis; we had over 20 additional leaders join the team that we named the "Welcome Crew." The Welcome Crew volunteers received communications regarding the process and role expectations (see Appendix K for communications), as "in the most successful organizations, employees understand their role in the change effort" (Smith, 1998, p. 47).

Evaluating Success of the Implementation. While getting to the implementation of the plan took considerable research, analysis, and collaboration, the work was not done there. Part of the action research process is evaluation, so as a team we needed to identify how to evaluate the success of the plan after implementing the first phase of the plan. This information would provide us opportunities to learn what went well, in addition to changes or opportunities to make the program more effective for future iterations.

To evaluate the effectiveness of interventions, some researchers (Torgerson & Torgerson, 2001; Gorard, 2002; Gorard et al., 2006) proposed the increased use of experiment and control groups in research. Gorard (2002) posited that failure to utilize experiment and control groups was unethical within research, as the results would not be evaluated properly. However, there was another side to using experiment and control groups in research.

Kember (2003) found that experiment and control groups in research were used primarily by educational psychologists, who usually leveraged quantitative techniques within their research. From a different perspective, Wellington (2000), Kember (2003), and Sikes (2006) noted the potential effect on individuals should take precedence over the need to use experiment and control groups. Because we did not want to withhold information or disadvantage any new employees, we chose not to implement control groups for comparison purposes.

"Organizations are large, diverse and fragmented and tend to perform many activities simultaneously with various outcomes" (Amah & Ahiauzu, 2013, p. 663). Because of the complexity of the organization and the availability of interna resources, we reached out to internal market research experts to discuss the options for evaluation. They were impressed that we were considering how to evaluate the program in advance of the implementation, as often times the evaluation plan is an afterthought. "Academic and business mind-sets are too often seen as incompatible with one another; scholarly practitioners are told to keep their academic theories to themselves and often feel that in the extreme pace of day-to-day work, they hardly have time (or support) to explore the specific theory and research that might prove helpful (Short, 2006)" (Lombardozzi, 2013, p. 315).

As a team, we discussed and created an evaluation plan to determine the effectiveness of the new employee experience program (see Table 16). Initially we wanted to create a short survey to gather quantitative and qualitative data, but that was not a viable option when discussed with leadership due to the number of e-mails and surveys sent to employees. As a result, we chose to gather the information through 1:1 conversations with the new employees and hiring managers and supplement that with leader feedback. The feedback from leaders, employees, and hiring managers follows Table 14.

Table 14

New Employee Experience Program Evaluation Plan

Vehicle	Estimated Timing	Purpose
Leader feedback	First 2 weeks of implementation	Perspectives and buy-in from existing employees
New Employee 1:1 Conversations	2 weeks after start date	Feedback about initial experience & suggestions for phase 2 plans
Hiring Manager 1:1 Conversations	2 weeks after start date	Feedback about initial experience & suggestions for phase 2 plans

Feedback from Leaders. We sent programmatic communications to over 3,300 employees across the organization. We received numerous positive responses and feedback, including the following comments:

> *"This looks really good. Nice work."*

> *"Very nicely done with lots of thought put into it."*

> *"I feel strongly that it is something that should be done and I also believe we can make an immediate impact on our colleagues and our company simply by communicating and being empathetic."*

> *"I am 100% in support of improving the onboarding experience!"*

> *"This is so great!!!"*

> *"It is great to see these types of things come to light. We are all happy to continue to close gaps and improve on our talent experience together."*

> *"This is such a great initiative!"*

> *"This is definitely exciting, thank you!"*

> *"Thank you! These are great tools for welcoming new employees. I'm excited to extend our culture to our new colleagues. Appreciate the opportunity to give back."*

> *"This is great work! Thank you to you and the team for pulling this all together."*

"I am looking forward to welcoming the new employees! I have found what has been put together very thorough and helpful!"

"Thank you for the opportunity, I am looking forward to being able to welcome our new hires!"

"Wanted to share with you the feedback I received from my newest team member on the New Employee Experience Initiative you sent out last week. It does make a difference and gives a great intro to our culture."

Feedback from New Employees and Hiring Managers. In addition to receiving feedback from the leaders, we conducted 1:1 conversations with the new employess and hiring managers who received the communications. We will continue to source feedback from employees throughout the next 6 months. Initially, the feedback we received from the new employees includes the following:

Good information. Made me feel welcome in a large organization. I appreciate the company information to help me assimilate.

It's a big place, so the communication is good to make it feel smaller. Everyone has been very welcoming, which I loved.

Good info, but I didn't have access to it for a few days because I didn't have a computer. Need to work to get the computer to the employee on day 1, as I couldn't do work for a few days. I met with people, but didn't get other stuff done.

So far, my thoughts on the program are as follows: It's incredible to be part of this company. When going through the interview process at various companies you always hear about that company's values and culture and they all sound similar, but when it comes down to it, not all of them practice what they preach and it feels more like 'aspirational values' than 'actual values.' I can say though that after being here now starting my 7th week, it really is a breath of fresh air in corporate America to be at a company that truly walks the walk as instead of just talking the talk. Top down from everything that you've done and how you lead our team to everyone that I've met and interacted with here so far in this role, it's truly been an incredible experience and I couldn't be more happy to be here.

I'm happy so far here – I've been surprised that people have been really friendly and very helpful. I thought that such a big company would not be easy.

We also connected with hiring managers to get feedback about the materials sent to them, in addition to any additional feedback from their new empoyees. Below is information they shared through the 1:1 conversations:

> *Getting the checklist is helpful, because then I don't need to go look for it on my own. Also my new employee liked getting the communications. It was helpful for me as I didn't have to show the employee everything – the letter showed the new employee where to find information.*
>
> *My employee appreciated the information. It was great for me, too, to help make sure I did as much to help welcome to the company.*
>
> *The checklist is good. It's a reminder of what I should be doing to help a new employee.*
>
> *I partner with the Business Liaison to onboard a new employee. My liaison is crucial in the process, as they set up the computer and the work station. Without them, I wouldn't know what to do.*
>
> *This was the first time I hired someone, so was good to have a checklist. The recruiter helped guide me to some of the other company resources also. The process hasn't always been smooth, but this helps to make sure I keep the employee in mind.*

Reflecting on Actions Taken

According to Coghlan & Shani (2014), "the heart of any action research paper is the narrative or story of what took place" (p. 531-532). This is where the cycles of action and reflection show the work of constructing, planning, implementing, and assessing to generate understanding for future opportunities. Researchers (Kemmis, 1993; McCartan, Schubotz, & Murphy, 2012) noted the importance of reflection as a key, crucial step within the action research process because it is the connection between research and action. "Reflection and learning are cognitive processes, whereas inquiry, like action, is more centered on the outcome or results. How one thinks about the past is important because motivation and the role of emotion are significant features of reflection" (Sofo, Yeo, Villafane, 2010, p. 211).

"One aspect which cannot be over-emphasized is the importance of allowing time to step back from the action to meticulously reflect and analyze what happened in the organization (Daudelin, 1996; Näslund, Kale, & Paulraj, 2010, p. 337). Researchers noted that "the reflective stage is considered by some to be the most critical part of the cycle" (Baskerville, 1999; Rai, 2012, p. 229). This is because it provides the chance to make decisions about potential revisions and both individual and group learning occurs. Learning is achieved through reflecting and providing feedback on actions taken by team members (De Loo, 2008; Kolb, 1984; Revans, 1982). When completing an action research study, it is important to assess its results and the personal and professional development of the team members, including the researcher.

Researchers need to be "self-reflexive about their vulnerability: to have realistic expectations, tolerance, humility, to be able to listen and above all, to have an openness and ability to learn" (Bell, 1998; Coghlan & Shani, 2005, p. 534). Reflection is a way of analyzing the personal and professional experience to increase understanding a particular situation. Patton (1997) noted that "one doesn't learn from experience; one learns from reflection on experience" (p. 95). Furthermore, "talking about and planning strategies to improve teaching are not the same as doing it. The determination of what to change grows out of reflection with peers. Strategies for implementing change can also emerge from collaboration. It is not enough to know how to improve a situation; ideas have to be put into action in order to test the transference of understanding into the context of a specific teaching situation" (Albers, 2008, p. 83).

Levels of Learning Within Action Research. Real-time organizational problems are a vehicle for learning. Marquardt (1999, 2004) noted the value of learning through solving organizational problems, proposing that the work environment is the best place to test ideas, problem solving in the workplace has a social dimension, and the objectives of learning are equal to the objectives of taking action.

The learning that occurs within action research happens at different levels: individual, group or team, and organizational. “Individual learning refers to the change of skills, insights, knowledge, attitudes, and values acquired by a person through experience, self-study, technology-based instruction, and observation” (Sofo, Yeo, & Villafane, 2010, p. 214). Individual learning focuses on the individual’s changes through participation in this research.

Group or team learning refers to “an increase in capability, that is, people’s individual learning as well as the integrated use of people’s cognitive powers, values, self-esteem, motivation, emotional development, and personal qualities” (Sofo, Yeo, & Villafane, 2010, p. 214). It focuses on the synergy of group accomplishment, which is greater than the sum of the individual accomplishments. Group learning effectiveness depends on each member sharing accountability for their role and actions within the group (Katzenbach & Smith, 1993).

Types of Learning Within Action Research. Action research is a way that provides opportunities that encourage change, foster a democratic approach, empower individuals through collaboration, encourage reflection, and promote a process of testing new ideas (Creswell, 2012). Learning comes from the team shared experiences that are achieved through the plan implementation and from critical reflection on those plan actions. "Engagement in the cycles of action and reflection perform both a practical and philosophical function in its attentiveness and reflexivity as to what is going on at any given moment and how that attentiveness leads to decisions and choices and yields purposeful action" (Coghlan & Shani, 2014, p. 526).

Within the action research process, reflection helps clarify connections between actions taken and the outcomes. Team members were asked to individually reflect two times during the project – about mid-project and post-project. For the post-project reflection, I chose to ask reflective questions to capture six types of learning as identified by Sofo, Yeo, & Villafane (2010): action learning, cognitive learning, behavioral learning, experiential learning, organizational learning, and problem-based learning. Appendix R details these different learning types, theoretical assumptions, and examples of reflective questions. Within Chapter 5, Table 17 details the mid-project reflection and Table 18 details the post-project reflection, aligned with the six types of learning.

Team reflection was conducted throughout the process, with lessons learned identified and discussed in detail at team meetings. Based on these discussions, the team identified positive and negative lessons learned, as well as the enablers and barriers to change within this research study. These are detailed in Chapter 5.

Chapter 5: Discussion of the Results

The purpose of this action research study was two-fold: (a) to further the organization's on-going culture transformation and (b) to develop employees at a health care organization to better understand organizational culture and change management concepts to support this change and future changes. This study focused on employee involvement through action research to identify and implement changes to support a culture transformation. This study posed the following research questions, which serve as the framework for this chapter.

1. How might the organization prepare to support its on-going culture transformation?
2. What tools, processes, and initiatives can the organization explore to support the existing culture shift?
3. How can the organization engage leadership at numerous levels to support the culture shift?
4. What are the enablers of successful culture change?
5. What are the most common barriers or deterrents to culture change?
6. What are the implications for managing culture change?

Supporting the On-Going Culture Transformation

Organizational culture "is a complex tapestry woven from the assumptions, attitudes, values, beliefs, collective memories, and customs of an organization" (Kimball, 2005, p. 3). It is upon these learned, shared assumptions that deeply embedded and powerful meanings are created (Fine & Hallett, 2014). Culture is linked to local, everyday interactions and social relationships. "Culture is not all that matters in organizational life, but the meanings that are a part of group culture and the effects of those meanings are ever-present and are evident in shared awareness and memory, performance, and differentiation" (Fine & Hallett, 2014, p. 1778).

To support this study's organizational culture transformation, the research had to make a difference in practice, not only at a theoretical level, as we were looking for tools, processes, and initiatives that could support the ongoing culture transformation. This supported the recommendation made by scholars Appelbaum, Habashy, Malo, and Shafiq, (2012), who called for a greater emphasis to produce research that is usable for those who practice change management. As a result, the decision was made to use the action research process to further the culture transformation, to develop employees, and to identify innovative solutions. During the process, we generated many lessons learned and practical recommendations for those practicing change management. Consequently, action research may be viewed as a research methodology that could support a culture transformation, as it resulted in the generation of several ideas, with one idea implemented during this research study.

Action Research as an OD Tool to Support Culture Change. Sullivan, Rothwell, & Balasi (2013) highlighted the action research process as "the pillar of all change work" (p. 22). Action research designs are a systematic way to gather information about and improve the ways an organization operates (Creswell, 2012). Action research can be a process that supports deep change, which impacts how participants see themselves, their workplace, and their professional practice. "Action research explicitly and purposefully becomes part of the change process by engaging the people in the program or organization in studying their own problems in order to solve those problems" (Patton, 2002, p. 221).

Organization development theoretical roots are grounded in human relations training (Bennis, 1963), action research (Kolb, 1960; Lewin, 1951), participative management (Likert, 1967; Mohrman & Ledford, 1985), and strategic change (Jelinek & Litterer, 1988). Action research is an iterative problem solving process that has become a well-established OD tool (Toracco, 2015). Action research is valuable for change management, as it maintains close relationships between HRD researchers, practitioners, and organizations (Githens, 2015).

Dick (2015) proposed that "action research is a propitious approach for engaging with many current and emerging issues" (p. 442). Because of its approach to engage with different issues, "action research can seek small-scale localized changes or it can seek large-scale changes" (Githens, 2015, p. 195).

According to Zuber-Serritt & Perry (2002) action research includes: "(1) a group of people at work together; (2) involved in the cycle of planning, acting, observing and reflecting on their work more deliberately and systematically than usual; and (3) producing a public report of that experience (such as a thesis)" (p. 173). Zuber-Skerritt (2002) further noted that participating in an action research project fulfills basic human needs, including success/worth, fun/enjoyment, freedom/choice, and belonging/respect/love.

Christenson et al., (2002, p. 262), described ten aspects of good action research. Table 15 details these ten different aspects of action research and specifically how this action research study demonstrated these ten characteristics.

Table 15

Action Research Aspects Demonstrated in Project

Aspects of Action Research	Demonstrated in Project
1. Research Proposal	• Rationale for need and purpose of study • Detailed research questions
2. Research permission of participants	• Consent form for participation
3. Importance of collaboration	• Best practices research • Partnerships across organization • Participant discussion and feedback
4. Varied approach to doing action research	• Literature search • Description of action research • 8-step project guidelines
5. Taking field notes	• Journal maintained for meeting notes and researcher personal reflection
6. Other data collection methods	• Data collection plan • Explanation of data • Detailed organizational data
7. Data analysis	• Analysis of hiring information, survey information, and focus group data
8. Researcher journals/reflections	• Journal maintained • Detailed reflection by participants and action researcher
9. Cyclical nature of research	• Planning iteration process • Versions of ideas & materials
10. Influence on teaching/application	• Participant feedback • Meeting preparation • Lessons learned

Based on Christenson et al., 2002, p. 262

As shown in Table 15, the ten aspects of good action research were accomplished by CART following Plano Clark and Creswell's (2015) eight-step action research process. The main benefits of this process were the collaborative opportunities for participants, the idea generation to support the culture transformation, and the implementation of an initiative. While the team found the process useful, with many lessons learned, Garvin and Bargal (2008) noted that “action research in recent years has not been used as frequently as we believe it should be to add to our knowledge of (a) group processes, (b) the group as an instrument of social change, and (c) effective means of group facilitation” (p. 3). Two leading human resource development scholars (Swanson & Holton, 1997, 2001) noted that many researchers consider action research as a methodology only to diagnose and solve organizational problems; they went as far as noting that action research does not constitute a research methodology.

However, other scholars including Brooks and Watkins (1994) and Marsick and Watkins (1997) noted that action research is a legitimate research methodology for problem solving, knowledge production, and for scholarly publications. Maurer & Githens (2009) posited that“in addition to solving problems, the potential of AR lies in the creation of mutual understanding and learning in and through dialogue, critical reflection, and action” (p. 269). Furthermore, the value of action research has been noted by scholars Swanson and Holton (2005) who have now included an entire chapter on action research as a mixed-method approach to conducting research in organizations, demonstrating that they have slightly softened on the topic.

Feedback from participants and senior leaders supported action research as a tool that can be leveraged to further culture change because of its focus on solving organizational problems, while involving employees. This feedback supported the recommendations by Greenwood and Levin (1998) and Rachele (2012) who proposed that action research is a vehicle for continuous, sustained change, in addition to providing the opportunity for reflective learning with an increased focus on ongoing dialogue. The key to furthering the culture transformation is to involve employees, whether through action research or other ways.

Employee Involvement in Organizational Change. "Involvement entails building human capacity, ownership and responsibility. It is very necessary as it leads to united vision, values and purpose" (Amah & Ahiauzu, 2013, p. 662). McShane & Von Glinow (2003) noted that through involvement, employees gain a level of decision-making authority that was not previously within their area of decision making. As a result, employee involvement extends beyond controlling resources for only his/her job and now include the opportunity to extend the decision making to the work unit and the organization.

Throughout this research study, team members had opportunities to participate in activities different than their traditional work responsibilities. For example, team members conducted best practice research, developed and conducted focus group research, and provided feedback on creative materials. By doing different activities, team members enhanced their current role and developed additional skills. This was key for this study, as one of the objectives was to develop the employees through the involvement in action research, as researchers determined that involvement is an important dimension of corporate culture that impacts its organizational effectiveness (Denison, 1990; Denison & Mishra, 1995).

Amah and Ahiauzu (2013) highlighted different forms of employee involvement; "formal participation occurs in organizations that have established structures and formal expectations that support this form of participation. Informal participation occurs where casual or undocumented activities take place at management discretion" (p. 663). In this study, CART member involvement was formal, as we followed Plano Clark and Creswell's (2015) eight-step action research process.

Employee involvement can be voluntary or required; it is voluntary when individuals participate without any required force, while it is required when government activities may require participation (Strauss, 1998). Participation by CART members was voluntary over the 13-month time period. They willingly accepted the opportunity to participate in the research study, and none of the members requested leaving the group during any time.

Amah and Ahiauzu (2013) noted three different levels of employee involvement, detailed from the lowest level of involvement to the highest level of involvement:

1. Selective consultation – employees are asked for information or opinions about an issue;
2. Moderate level – employees are told about the problem or issue and offer their diagnosis and recommendations through individual or group participation; however, the final decision is beyond their control;
3. Highly involved – employees fully participate in an issue, including the decision making, which increases the employees' level of sense of ownership, responsibility, team orientation, and capacity building. Highly involved cultures "rely on informal, voluntary and implied control systems, rather than formal, explicit, bureaucratic, control systems" (p. 663).

In this research study, CART members were highly involved; they demonstrated this through the research they conducted, their input and feedback on potential ideas, and their involvement in decision making (scope, project phases, communications, creative materials). Because of this collaborative team spirit, we were able to generate the ideas, create the action plan, and implement an innovative solution. “Organizational cultures characterized as ‘highly involved’ tend to strongly encourage employee participation and create a sense of ownership and responsibility. Consequently, out of this sense of ownership grows a greater commitment to the organization and an increased capacity for autonomy” (Amah & Ahiauzu, 2013, p. 662).

Initiatives to Support a Culture Change. Action research was the methodology selected to drive the problem identification and creation of innovative solutions to support the culture transformation. This process created a collaborative team that brainstormed and researched numerous ideas to support the culture shift. The team’s experiences, combined with the data collected to identify and analyze potential organizational challenges, resulted in generating a list of organizational opportunities:

- New employee experience (including onboarding and orientation);
- External recruitment of new employees;
- Internal recruitment and movement of employees;
- Manager toolkits to support culture transformation;
- Best practice research and subsequent manager communications;
- Creation of affinity groups to support employee interests;
- Benefits communication to educate employees; and
- Real estate opportunities to visibly support culture (i.e., signage, photos, etc.).

While the team narrowed its scope to focus on one of these ideas (new employee experience), three of the other ideas are currently being pursued by other project teams after sharing this information with senior leadership: benefits communications, real estate opportunities, and manager toolkits (focusing on storytelling). The benefits communications initiative is being researched by the total rewards team and human resources generalists, while I am leading the real estate project in conjunction with real estate and branding, and the manager storytelling toolkit by partnering with training and communications. This demonstrates that the ideas generated by CART members continue to be researched outside the scope of this study.

Engaging Leadership to Support Culture Change. CART discussed opportunities to engage leadership throughout the project, as we discussed the value and purpose of leveraging leaders across the organization at multiple levels. Specifically, the team highlighted organizational employee groups that could help support the new employee experience to further the culture shift (see table 16).

Table 16

Groups to Support New Employee Experience

Leadership Group	Estimated Population
Culture Leadership Teams	24
Senior Leadership	125
Human Resources	100
Recruiting Department	100
Hiring Managers and Team Members	500
Welcome Crew	700
Culture Champions	2,400
New Employees (2016)	6,000

Because these groups were identified as crucial to support the implementation of the new process, we worked with leaders in most of these groups to introduce and explain the updated initiative. This created awareness of the initiative and gained support for the updates in the future (anticipating the upcoming phases 2 & 3). Furthermore, we identified the new employees hired during 2016 as both the recipients of the experience, as well as a group to support the experience, as they will be asked to participate in future phases of the program, so we viewed them as important advocates of the program.

Enablers of Successful Culture Change. Employees have limited opportunities to participate in opportunities in which they "think critically, intentionally, and systematically about their actions and the context of those actions" (Samaras & Gismondi, 1998, p. 718). Through this action research process, we identified five categories of culture change enablers, which are explained in greater detail below: (1) employee involvement; (2) systems thinking and practice; (3) senior leadership support; (4) champions within the business; and (5) communications.

Enabler #1: employee involvement. Numerous researchers reported that employee participation is related to positive outcomes including increased readiness and acceptance of change, as well as support for change (Armenakis & Bedeian, 1999; Holt et al., 2007; Oreg et al., 2011; Wanberg & Banas, 2000). In addition to these positive outcomes, "participation is believed to have a number of positive effects on the strategy process. It is assumed that involvement of those affected by a change in strategy will reduce organizational resistance and create a higher level of psychological commitment among employees towards the proposed changes" (Lines, 2004, p. 193).

Participation or employee involvement can be defined in numerous ways. A definition that has been used by numerous authors is that participation "is a conscious and intended effort by individuals at a higher level in an organization to provide visible extra role or role-expanding opportunities for individuals or groups at a lower level in the organization to have a greater voice in one or more areas of organizational performance" (Glew, O'Leary-Kelly, Griffin, & Van Fleet, 1995, p. 402). Research noted that the opportunity for employees to participate in the research was valuable, as "participating as co-researchers seems to boost employees' self-image as they participate as fully functioning adults whose ideas and opinions are valued" (Gilbreath, 2008, p. 24).

This research study relied on considerable employee involvement to identify opportunities, gather and analyze data, provide input and feedback, and identify lessons learned. The project team was comprised of eight employees; however, the overall involvement was much greater as we asked other employees, departments, and leaders for their input and feedback. Considering the overall project, we involved over 100 employees in the development and implementation of the project.

CART members noted that the diversity of the action research team members and partners added to the positive experience and overall results. They highlighted that being from different departments, with different backgrounds, was highly beneficial to think beyond their smaller organization. Team member feedback included:

- *"This opportunity allowed me to meet and form relationships with employees in the company that I may not have otherwise had the opportunity to work with;"*

- *“I will try to push myself to think outside of the box more, and include people that may have different perspectives than my own;” and*
- *“The process was a great reminder to move outside of your close circle when forming project teams as others with more diverse perspectives may bring even better ideas.”*

“All people share a ‘basic motivational need system’ (Kets de Vries & Florent-Treacy, 2002, p. 300, as cited in Plakhotnik, M. S., Rocco, T. S., Collins, J.C., & Landorf, 2015, p. 42) that ensures peoples’ survival.” Within organizations, two of these motivational needs become highly relevant - attachment/affiliation and exploratory/assertive (Kets de Vries & Florent-Treacy, 2002; Plakhotnik et al., 2015). To better understand these needs, “attachment/affiliation refers to people’s need to feel connected or belong to a group or a community, while exploratory/assertive refers to people’s need to be useful, find meaning, be creative, and experience pleasure” (Plakhotnik et al., 2015, p. 42). As a team, we created a learning community in which we met these two motivational needs:

- attachment/affiliation through the creation of a diverse learning community and
- exploratory/assertive through the opportunity to conduct research, identify options, and implement action.

Team member comments supported meeting these two motivational needs:

- *“we built new relationships and formed a close-knit team because of the work we did;”*

- *“I’ve grown my network even more and I’ve gained a little bit of courage and empowerment. This was a fun and rewarding experience;” and*
- *“I’m very glad to have been part of this team!”*

The importance of employee involvement and participation was noted several decades ago, as Argyris (1957) posited that participative practices in the workplace fulfilled the general needs of healthy adults to move from dependent, passive infants to independent, active adults. Arendt (1958) supported the value of participation, positing that it is aligned with democratic values more than autocratic decision-making. Lines (2004) noted that “participation has been found to be positively linked to attitudinal variables such as commitment to change” (p. 199). Furthermore, employee involvement has been argued to result in qualitatively better strategic decisions because the strategic decisions are based on political and socio-technical considerations within organizations (Kim & Mauborgne, 1998; Lines, 2004).

“Participative processes provide management with an arena for explaining and presenting the arguments for a proposed change” (Lines, 2004, p. 198). The importance of participation in the communication process was intriguing to researchers Rogiest et al. (2015) who studied quality change communication and employee participation as two separate change process variables. They found that “an involvement-oriented climate enhances affective commitment to change, and that this effect is fully mediated by quality change communication” (Rogiest et al., 2015, p. 1101). Additionally, they found that “employee participation reduces affective commitment to change in a highly formalized climate” (Rogiest et al., 2015, p. 1101).

Enabler #2: systems thinking and practice. Systems thinking is "seeing organizations as a whole, made up of interrelated and interdependent parts" (Coghlan & Brannick, 2010, p. 93). Systems thinking is based on the belief that the world is systemic, meaning it should be understood as an interrelated whole (Flood, 2010, p. 269). "Systems are dynamic. They are changing all of the time" (Burns, 2014, p. 5). As a result, when something changes, it changes the relationship between all parts of the organizational system. "Because organizations have become more complex and interdependent, a disruption anywhere in the system may be felt everywhere and by everyone" (Worley & Mohrman, 2014, p. 216).

Bellinger (2004) defined a system as "an entity that maintains its existence through the mutual interaction of its parts" (p. 4). He noted that "a system is much more than a heap or a lump. It is the interactions which are responsible for the characteristics of the system, not the parts. The interactions of the parts become more relevant to understanding the system than understanding the parts " (p. 4-5). Organizations can be viewed as systems in which "planning, control, structural, technological and behavioral systems are interdependent and interrelated" (Coghlan & Brannick, 2010, p. 93).

In this research study, we were a small team of eight total members representing two businesses and seven departments. While team members did not know each other or work with each other at the beginning of the study, we shared information from our experiences, as we were each part of the same larger system. Additionally, we discovered that we were able to identify the opportunities to be part of the solution for the system. Keeping a systemic perspective in mind throughout the action research process helped us to construct meaning within a highly systemic world.

We realized that "workplace culture does not exist in isolation of a host of other broader cultural influences" (Cole, Oliver & Blaviesciunaite, 2014, p. 789). Consequently, workplace culture exists within a much larger system and enabling the culture shift required collaboration and partnerships outside the smaller action research team. "Underlying the notion that seemingly solid and powerful structures can be changed in important ways, a central idea in AR, is the idea that the world is much more complex than it seems on the surface" (Greenwood, 2015, p. 203). Because of this complexity, Burns (2014) noted that action researchers must focus on systemic solutions that consider the entire system, rather than only addressing the specific problem, which is why we partnered with recruiting and communications to discuss the overall process and opportunities within the entire system.

As an insider action researcher, I was seeking insight regarding the systemic patterns of thinking and acting within the organizational system, as well as finding meaning to this inquiry. I realized that implementing a large-scale change required collaboration and partnerships with numerous departments and experts across the organization. The project could not be implemented in isolation. Rather, our suggestions needed to connect to and support the recruiting and hiring process. While the team could have implemented a program with no connection points, we created awareness, gained buy-in, and gathered feedback by identifying and leveraging the system to our best ability to increase the likelihood of success.

This was particularly important, as "the poor success rate in organizational cultural change seems to be partly due to organizational change agents' lack of systemic thinking and understanding of the causal structure and leverage possibilities for sustained change within the organization’s context” (Molineux, 2013, p. 1590). Furthermore, these failed change attempts often lead to “cynicism, frustration, loss of trust, and deterioration in morale among organization members” (Cameron & Quinn, 2006, p. 11-12), which also impacts future change opportunities.

“AR is premised on the notion that the reality we confront is a complex, dynamic, interactive open system. What we see is never the whole but it matters for us to understand that what we see is part of a larger system and that the dynamics we are trying to create must confront the larger processes of that system in order to be successful” (Greenwood, 2015, p. 207). Burns (2014) recommended that people engaged in inquiry and action research need to “see the system” to truly understand the system dynamics at play (p. 7).

As a team, we often discussed the major stakeholders and the organizational politics to fully understand these dynamics. Through the reflection process, team members noted the importance and value of considering the system and how large a team you’re really part of, which fully supported the systemic thinking perspective.

There was a strong relationship between systemic thinking and the action research process. The implementation of action required collaboration across a large organization, within an organizational system, to effectively leverage resources and make appropriate connections with other organizational processes. After communicating the implementation of the new employee experience, the organizational training group reached out to me to discuss next steps to ensure alignment, as they were in the process of updating the employee orientation program for employees across the organization. “Changes must be viewed in a coordinated fashion to allow the organization to act as a system rather than as distinct parts" (Worley & Mohrman, 2014, p. 221). As a result, this is a great example of systemic thinking and the value of collaboration across the organization to develop and implement the best program.

Enabler #3: senior leadership support. Senior leadership played an important role in this action research study, as senior leadership both challenged and cooperated to ensure that the problems under consideration were practical, relevant, and appropriate. Numerous scholars noted the growing evidence regarding the importance of the leaders' role in organizational change success (Borins, 2002; Higgs, 2003; Higgs & Rowland, 2005; Kotter, 1995, 1996). Of particular importance is "top management's continual reinforcement, elaboration, and interpretation of the core vision to keep it from becoming obsolete or abstract" (Bartlett & Ghoshal, 1990, p. 141). "OD efforts can be impaired because the top leaders do not walk the talk. Modeling change at the top inspires others to embrace becoming positively different" (Sullivan, Rothwell, & Balasi, 2013, p. 18).

When I posed the opportunity to conduct an action research study as part of a Ph.D. program, I was pleasantly surprised by the overwhelming support. This was the second time I had proposed an internal research opportunity; unfortunately, the first opportunity was denied by a senior leader . Therefore, without senior leader support this research study would not have occured within this organization.

In the study organization, senior leader support was critical during the culture transformation, which has been accelerated and sustained through the use of a "leader led learning" approach (Heckelman, Unger, & Garofano, 2013, p. 25) for its educational components. The use of leaders as facilitators demonstrated the need for change, credibility in the efforts, and investment in the movement. Additionally, the "leader led" model created culture champions across the business.

Heckelman, Unger, & Garofano (2013) noted that culture change takes place more effectively when worked at three distinct levels: organization, team, and individual. This action research study focused on changes at these three levels:

1. Individual – CART member knowledge and experience through the action research process, culture principles, and change management models;
2. Team – CART formation using the group development phases of inclusion, control, and intimacy; and
3. Organization – New employee experience project implemented to enhance the new employee onboarding experiencing and leverage current employees as change champions to welcome new employees.

"At the organizational level, senior leaders need to clearly communicate, model, and reinforce the values, beliefs, and culture they want to create" (Heckelman, Unger, & Garofano, 2013, p. 26). Senior leaders can also be instrumental at the team level, where the focus "needs to be on translating strategic goals into team responsibilities, then addressing the impact of these changes on the team" (Heckelman, Unger, & Garofano, 2013, p 26). At the individual level, senior leaders can share and demonstrate the specific behaviors that employees should start, stop, and continue to support organizational change. "The executive team comes to understand transformation by experiencing a group and individual quantum leap in the way they relate intra-personally, to each other and the system (Donnan & Sullivan, 2011, p. 206).

Enabler #4: champions within the business. "The use of change champions to implement new innovations in organizations spans nearly five decades" (Shaw et al., 2012, p. 676). Multiple disciplines and organizations have used change champions, highlighting their value and importance in organizational change, as they "sponsor and promote change initiatives in organizations" (Klonek, Lehmann-Willenbrock, & Kauffeld, 2014, p. 335). "The value of champions is particularly apparent for health care changes, as evidenced by the sheer number of articles that mention the use of a champion" (Shaw et al., 2012, p. 676).

Change champions are defined as "individuals who dedicate themselves to supporting, marketing, and driving through an innovation" (Kaasalainen et al., 2015, p. 79). "Change agents engage in awareness of the issues facing the organization. They are plugged into the relevant issues happening in the organization's environment, the business, and its people in order to orient their activities to be relevant to stakeholders" (Worley & Mohrman, 2014, p. 218).

In this study, the first change champions were the CART members, as they conducted the research to fully understand the current situation and what was changing. With this information, they have been helpful to support the communications roll-out within their teams and departments. In addition to these CART members, we partnered with leaders from across the company to discuss the research and recommendations for this project, so they were also familiar with the current state and the preferred future state; because of their involvement and awareness, they could also be considered change champions in this process. Of particular importance was the role of our communications partners who collaborated with us throughout the project and have been strong advocates for the development and roll-out of the initiative. Furthermore, the communications partners provided coaching and feedback during challenging times.

Shaw et al. (2012) proposed two types of organizational change champions:

(1) Project change champion – the point person for the project who helped drive the team's change efforts; and

(2) Organizational change champion – a person who supported the specific project change efforts in addition to broader, ongoing improvement.

In this research study, CART members served as both project change champions and organizational change champions. The type of role varied for each team member throughout the process, depending on the particular situation. "Both roles are valuable and the effectiveness of the combination seems to be associated with both the intensity of change activities during the intervention and the extent to which changes were sustained after the intervention" (Shaw et al., 2012, p. 682).

Research done by Shaw et al. (2012) noted that successful change agents or champions demonstrated several key behaviors: (a) actively promoting a new innovation; (b) networking across the organization; (c) identifying and leveraging resources; (d) navigating the socio-political organization; (e) building support by sharing the vision and increasing employees' understanding; and (f) ensuring that the innovation is implemented, even with potential organizational resistance. In this research study, CART members and our partners demonstrated these key behaviors throughout the process.

Enabler #5: communications. Smith (1998) highlighted the five key drivers of successful change, according to executives who have led successful change initiatives: "strong leadership, effective communication, a tight alignment of people and organizational goals, adequate training and funding, and a clear definition of the compelling reasons to change" (p. 45). Effective communication has long been recognized as relevant to successful organizational change and has been highlighted as key to building change readiness, reducing uncertainty, and gaining commitment (Armenakis et al., 1993; Elving, 2005).

The etymological root of the word "communication" is the Latin word "communicatione," which means to participate, pool, or take action (Marques Simoes & Esposito, 2014, p. 325). When considering this connotation, "communication can be taken as a social process where people, immersed in a particular culture, create and exchange meanings, thus addressing the reality of everyday experience" (Marques Simoes & Esposito, 2014, p. 325).

Understanding the importance of communications in successful organizational change, we created a communications plan. The plan in this action research study highlighted the use of participatory communications and programmatic communications.

Participatory approaches "invite input, using involving and empowering methods to gain the insights of various stakeholders to shape the change programme" (Russ, 2008, p. 204). Examples of participatory communications in this study included formal and informal meetings with idea exchange, smaller work groups, focus groups, feedback surveys, and senior leader feedback. By gathering and using input to create the action plan, we established support for the change across the organization and the process was grounded in democratic workplaces in which all employees expect involvement in organizational change, no matter their title or role.

Programmatic approaches are focused on “telling and selling” (Russ, 2008, p. 200), emphasizing top-down distribution and delivery focused on selling employees the reason to be committed to implementation (Armenakis & Harris, 2002). Programmatic communication utilizes highly centralized and controlled approaches to change implementation, with little to no organizational participation. Examples of programmatic communication activities in this study included presentations, memos, and word-of-mouth. Most organizational changes use programmatic approaches, which are considered less effective by implementers and stakeholders than participatory approaches (Russ, 2008). That is why we chose to use a combination of the participatory communications and programmatic approaches – to ensure involvement across the organization and to inform a large employee population.

“Because of the complexity and the interdependencies in the system, an important change challenge is to catalyze sufficient information exchanges across the system” (Worley & Mohrman, 2014, p. 218). Recognizing the complexity of the organization and the overall system, the proposed plan for the three phases of the new employee experience included many communication components. While the team established the ideas and components for the phases, the creative communications experts really brought it to life through their creative ideas, knowledge of current trends, and access to efficiently distribute the communications. The creation of the communications plan ensured that the team considered numerous stakeholders and communicated to them in advance of the roll-out. By communicating with these stakeholder groups, we received positive feedback and added more volunteers to the Welcome Crew without soliciting for additional volunteers.

Barriers to Culture Change. "Changing the culture of an organization once it has lived for some time is difficult, but not impossible" (Hofstede, 2015, p. 567). While changing organizational culture is possible, "any action researcher in an organization needs to understand how people in organizations can resist change" (Coghlan & Brannick, 2010, p. 96). Resistance to change can be viewed as "opposed or blocking energies and power directed at impeding, redirecting, rejecting or stopping change (Coetsee, 1999, p. 209). Coghlan & Brannick (2010) noted that "resistance is a healthy, self-regulating manifestation which must be respected and taken seriously by the action researcher" (p. 96).

CART members discussed the barriers to culture change, including our experiences researching and implementing the new employee experience project. As a team, we identified two categories of barriers or deterrents, which are explained in greater detail below: (1) resistors and (2) matrix environment within a large organization.

Barrier #1: resistors. Resistance to change is seen as a key reason for organizational change failures (Armenakis et al., 1993). "From a traditional change agent-centric perspective, employees who show resistance to change have been portrayed as bad apples that spoil the barrel, implying an intent to 'ruin' an entire change initiative" (Klonek, Lehmann-Willenbrock & Kauffeld, 2014, p. 335). Implementing changes "requires processes, which can engage people on a larger scale than is typical and a widening of the boundaries of the system of causality typically understood" (Burns, 2014, p. 4).

Engaging more people across the organization, particularly across organizational boundaries, was challenging. "This does not require us to engage thousands of people (although in some situations we might), but it does require a research and learning architecture which might involve hundreds of people, in multiple parallel and interlocking inquiry processes, across a system where issues are interconnected" (Burns, 2014, p. 4).

When connecting with numerous employees across the organization for this study, we did not encounter employees who explicitly resisted the change. Perhaps this was because the change was viewed, overall, very positively to continue to support our culture transformation. However, while employees were not actively "resisting" in the sense they did not support the change, we noted that some people kept their distance from the project, while others asked many questions to better understand how this would align with or impact their work on onboarding and orientation projects. Sometimes these questions were appropriate for clarification, while other times the questions were perceived like an interrogation to gather additional information. Furthermore, at times we felt an undercurrent of resistance because some employees took a "wait and see" attitude, while others provided rationale for why their work did not connect to this. As a result, these employees felt there was no reason to be engaged in understanding the change.

We viewed some of this undercurrent resistance as valuable feedback, in that it was helping us improve the clarity of the change objectives and consider the organization as a whole. When these types of messages are viewed as valuable feedback, "it can enhance the prospects for successful implementation" (Ford & Ford, 2009, p. 103).

Barrier #2: matrix environment within a large organization. "As many OD practitioners and researchers confirm, organizational realities are complex and messy"

(Maurer & Githens, 2009, p. 268). This complexity may be due to organizational politics, human dynamics, and organizational structures. Managers usually dislike complexity, preferring to keep it as simple as possible. As a result, organizations manage the complexity through organizational designs for a number of reasons: (a) continued pressure for growth, particularly for publicly traded companies; (b) the shift to customized solutions, rather than standardized solutions; and (c) the focus on growth in emerging markets (Galbraith, 2010).

"Few organizations can be successful today with a pure functional structure, because the resulting functional or divisional silos inhibit the amount of coordination needed in a changing competitive environment" (Anand & Daft, 2007, p. 330). Consequently, organizations are trying to break down these silos by using various horizontal mechanisms intended to improve communication and performance across the organization.

One of these horizontal mechanisms used in large companies is the matrix organizational structure, which "combines a vertical structure with an equally strong horizontal overlay. While the vertical structure provides traditional control within functional departments, the horizontal overlay provides coordination across departments to achieve profit goals" (Anand & Daft, 2007, p. 330). The purpose of the matrix organizational design is to "combine responsiveness to differentiated customer demand with varied technological expertise" (Miles, Snow, Fjeldstad, Miles, & Lettl, 2010, p. 94). The opportunity to provide responsiveness and flexibility is key and is often missing in single-line-of-command organizations. The matrix organization structure is known as "a dynamic organization structure that can absorb and be quickly responsive to unanticipated changes in job definitions and allocations – a structure that will encourage rapid and continuous tradeoffs throughout the total system, not merely on a one-to-one sequential basis (Sayles, 1976, p. 5).

Conducting action research in a matrix environment within a large organization proved both interesting and challenging. The structure of the action research project created another version of a matrix for the team members and the researcher. While it was beneficial to extend and establish the network across the organization, at times it was challenging to complete tasks due to the many competing priorities. For example, completing the creative theme and materials took longer than anticipated due to the many discussions, numerous iterations, and the scheduling of internal resources to update and finalize the materials. Furthermore, gathering the information for new employees and creating a sustainable process for distribution was at times challenging because of other organizational projects, priorities, and deadlines. As a team, we connected with numerous organizational resources to find support and other employees who could help in a timely manner. We realized that working within the matrix required a different skillset. For example, we relied more heavily on our influencing skills, communication skills, and relationship building skills. These were essential to achieve progress in this large organization, identify divergent points of view, and gain consensus across the organization.

Implications for Managing Culture Change. "Cultural issues are the most challenging issues in the field of intellectual capital and knowledge management" (Tabaghdehi & Salehi, 2015, p. 352). Many organizations have tried to change their organizational culture, but Smith (2003) found that most have not been successful, with a success rate of only 19% in four studies of a total of 284 cases.

A traditional view of culture focuses on the idea of shared values and beliefs, which is a common perspective in management literature (Smith, 2000). These shared values and beliefs are what distinguishes one organization from another and specifically define what is important in an organization and how things get done within that organization. “Cultural change is then characterized as the removal of values with negative associations, and their replacement with those considered to advance future organizational interests” (Smith, 2000, p. 153).

Through the action research process of participative data gathering and analysis, action planning, implementation, evaluation, and reflection, we identified a major implication for managing culture change – the need for continuous change reinforcement. The team realized that managing culture change in a large organization is not dependent on a single item or initiative. Simply implementing the new employee experience would not be the siver bullet to further the culture transformation. Rather, culture change requires changes and support at numerous levels and times within the organization. We realized this as we researched the best practices within the organization, noting how many activities and efforts were implemented to support the culture transformation. Additionally, when researching some of the ideas, we identified many plans for additional changes to support the culture shift. “A multifaceted implementation approach is needed that includes audit and feedback, education outreach, and a local opinion leader to address multiple barriers” (Kaasalainen et al., 2015, p. 79). Furthermore, “sustained belief and behavior change requires repeated efforts” (Heckelman, Unger, & Garafano, 2013, p. 27). The implementation of the new employee experience is an example of one of those repeated efforts that will be added to the long list of strategies and tactics implemented to date.

The strategies and tactics currently existing within the organization address numerous levels within the organization, per the suggestion by scholars Heckelman, Unger, & Garafano (2013) to implement changes at the organization, team, and individual levels to achieve sustainable, long-term change. To create lasting changes, "an organization's behavior and culture need to be thought of as a marathon, not a short sprint" (Heckelman, Unger, & Garafano, 2013, p. 27).

According to Hofstede (1994), changing a culture is not easy and isn't a "one-shot process." Rather, "it takes sustained attention from top management, persistence for several years, and usually a second culture assessment to see whether the intended changes have, indeed, been attained" (Hofstede, 1994, p. 11). "Simply communicating a new vision will not necessarily change an individual's beliefs" (Heckelman, Unger, & Garafano, 2013, p. 27). Rather, true culture transformation requires alignment and reinforcement of numerous opportunities and artifacts such as:

- Values (Schein, 1990; Shrivastava, 1985);
- Corporate success and failure stories (Higgins, McAllaster, Certo, & Gilbert, 2006);
- Language systems and metaphors (Higgins, McAllaster, Certo, & Gilbert, 2006; Hofstede et al., 2010);
- Symbols, ceremonies, and rituals (Higgins, McAllaster, Certo, & Gilbert, 2006; Schein, 1990);

- Rewards and reward systems (Higgins, 2005); and
- Physical surroundings found in the culture (Higgins & McAllaster, 2004).

The implementation of the new employee experience project explained our organizational values, provided a consistent language and process to welcome new employees, and created a particular ritual of existing employees welcoming new employees to the organization. Hopefully our efforts will become known as an important symbol and have a positive impact on the new employee experience for a considerable duration.

Culture Transformation Lessons Learned

Action research goes beyond change, alone, as it generates knowledge about a particular social system through the process of change. "In an action research project, it is expected that two sources of knowledge will be generated. The first is data, such as that collected in every scientific study. It is usually quantitative in nature. The second is actionable knowledge. Actionable knowledge (Argyris, 1993) is knowledge relevant for use in the organizational setting where the intervention of the action research takes place" (Bargal, 2008, p. 23-24).

Positive Lessons Learned. The team discussed the positive lessons learned, which include the following: participation, purpose, and innovative solutions. These three lessons learned are described in more detail.

Participation. Reason and Bradbury (2001) found that participation is the defining characteristic of action research. They noted that action research is based on a world view consisting "not of things but of relationships which we co-author" (Reason & Bradbury, 2001, p. 9). "Action research can be seen as involving a particular kind of interpersonal relationship that blurs boundaries between traditional roles of researchers and the researched" (Arieli, Friedman, & Agbaria, 2009, p. 264).

Boxall and Purcell (2003) defined employee participation as tools that "enable, and at times empower employees, directly or indirectly, to contribute to decision-making in the firm" (p. 162). Piasna et al. (2013) noted that employee participation opportunities increased in the 1980s and 1990s, as they were included within many human resource management measures. Marchington and Wilkinson (2005) differentiated employee participation into four types: direction communication such as emails, letters, and meetings; upward problem solving such as employee suggestions or employee focus groups; representative participation such as trade unions or collective bargaining; and financial participation such as employee profit sharing.

Numerous researchers highlighted that employee participation has numerous positive impacts: (a) improved health and well-being (Dhondt, 1998; Karasek & Theorell, 1990; Marmot, 2004); (b) increased performance because employees have information that is crucial for management to consider during organizational change (Piasna et al., 2013); (c) increased emotional connection to issues of diversity and inclusion (Pololi, Krupat, Schnell, & Kern, 2013); and increased quality of work due to individual task discretion and consultative participation (Gallie, 2013).

Group participation was essential when conducting this action research study. I believed that enabling the employees to play the role of co-researchers would empower them and ultimately lead to better research because of the connection to the individual departments across the organization. Individuals are more engaged and empowered when they are viewed as partners in the change process, which contributes to the likelihood of a sustained change (Kaasalainen et al., 2015; Scalzi et al, 2006). A connection of theory and practice for the CART members was generated, as members collaborated in a frequent, open way. Arieli, Friedman, and Agbaria (2009) noted that the participatory action research relationship has both functional and political elements. It was functional because the participants carried out functions and responsibilities that were previously reserved for researchers. It was political because participants and the action researcher shared decision making responsibilities.

Action research can be beneficial for employees who, through their participation, gain additional meaning from their work and create a sense of achievement. This sense of achievement or impact may occur in different ways, as the work of Wiek, Talwar, O'Shea, and Robinson (2014) focused on determining the impact of participatory projects, and they identified four categories that impact or effect the organization:

- Usable products – technologies, products, and publications;
- Enhanced capacity – new knowledge, enhanced understanding;
- Network effects – created or expanded network, trust; and
- Structural changes and actions – implemented plans, taken decisions, new jobs.

The implementation of the new employee experience initiative could be considered enhanced capacity for the new employees, as well as for the team members. Additionally, the team members experienced the network effects of being part of an extended cross-functional action research team. The collegiality amongst the CART members during the project revealed that they enjoyed the opportunity to collaborate and network with each other, as they demonstrated the three characteristics of authentic collaboration, according to McTaggart (1997): their role in setting the agenda of inquiry, their participation in the data collection and analysis; and their participation in the use of outcomes and the whole process.

Purpose. An inspiring observation of the team members was their positive attitude regarding the action research process and their sense of purpose and desire to improve the organization. They were constant in their belief that our efforts would make a difference and contribute to organizational change and support of the culture transformation, even at times when it felt like the project stalled. Team members provided feedback:

- "*We've been able to put our heads together to come up with actionable ideas that will bring real change in our culture"*
- *"At the end of the day, it felt like we all had the best interests of the company at heart and were able to move toward the best and most innovative solutions"*
- *"We stuck to our commitments and focused on what we agreed to accomplish as a team"*
- *"That we CAN change things if we have valid data, a logical approach and a team that has the desire and energy to make things happen."*

These positive attitudes were demonstrated through their willingness to conduct research, their ability to network within the team and across the organization, and their willingness to step up to help when needed throughout the project. Research noted that attitudes and behaviors take priority over the process and methodology in a participatory process such as action research (Chambers, 2005; Caister, Green, & Worth, 2011).

Innovation. "It is widely acknowledged that innovation is required in order not to increase the already sizable spending on health care in most developed countries" (Rydenfält, Larsson, & Odenrick, 2016, p. 3). This study used the action research process within a health care organization to further a culture transformation through employee involvement. The researcher and the team members worked together to design and conduct all phases of the research process, including design, data collection and analysis, planning, implementation, and evaluation (McTaggart, 1991; Rai, 2012; Whyte, 1991).

The desire for innovation and change implementation was a prerequisite for this action research study because of the emphasis on problem identification and resolution, with emphasis on questioning and brainstorming for innovative solutions. "Action research takes place in a context of discovery and invention as opposed to a context of verification. Discovery and invention, the main business of human science, have little to do with experimental designs" (Pine, 2009, p. 236).

"Human capital is the most significant asset of an organization and a source of creativity and innovation that includes all individuals' and managers' capacities, talents, knowledge and experience in an organization" (Tabaghdehi & Salehi, 2015, p. 351). CART members demonstrated their creativity and innovation, as they identified eight opportunities to support the current, ongoing culture transformation in the study organization. "Innovative capacity depends on the relation between the need for exploration of the problem domain and autonomy regarding goal formulation and supervision" (Rydenfält, Larsson, & Odenrick, 2016, p. 3). This was made possible by creating a collaborative learning community that encouraged innovation and new ideas, as team members feedback highlighted:

- *"Ideas were consistently discussed in a team environment where opinions were welcomed;"*
- *"With a minimal budget, the team had to be creative in the way we rolled out potential solutions;" and*
- *"The innovative processes we used have inspired me to find and implement solutions beyond the norm. In projects past, I have almost always applied a Six Sigma approach. Because this process often caused delay and red tape, I have taken a more collaborative approach knowing that I have to be more agile in my approach."*

Hofstede et al. (1990) noted that some organizations are highly process oriented, with conservative attitudes toward innovation and risk; in contrast to these organizations, results-oriented organizations are more risk oriented, fostering a workplace that encourages innovation to thrive. In a closed system organization, the environment is highly secretive, resulting in a long time for employees to fit into the organization. On the flip side, employees in an open system value and are influenced by the opinions of others and use the system to their advantage.

Negative Lessons Learned. The negative lessons learned, which could also be considered improvement areas for future opportunities, included the following: pace or time of research process, organizational alignment and priorities, roles and responsibilities, changes in resources, and implementation of action within a large organization. These five areas are described in more detail below.

Pace or Time of Research Process. Research participants shared that this action research study has taken longer than anticipated. Action research "is typically a slower approach because of the time required for the collective efforts of the co-researchers" (Gilbreath, 2008, p. 23). This pace is the result of the time required to investigate the symptoms, causes, and solutions, combined with the need to leverage organizational experts to help gain an understanding of the organizational problem (Gilbreath, 2008).

Despite the fact that action research is slower than some other alternative approaches, "the additional investment of time should result in a deeper understanding of problems and more efficacious solutions. It is an approach that demands more time on the front end (i.e., problem analysis) in return for better results in latter phases (i.e., implementation)" (Gilbreath, 2008, p. 23). Because action research is added to an employee's responsibilities, a manageable period of time is taken into account to conduct the research so that other regular work processes and responsibilities are not disrupted.

Due to this time requirement and demands over a long period of time, I was concerned about how to keep the members involved and engaged over this long timeframe. That is why frequent meetings and updates were provided to continue to engage the team members. This was particularly important during the implementation phase, as we needed to rely on other internal experts to create and distribute materials.

Organizational Alignment and Priorities. Organizational transformation "requires a sustained improvement effort that is guided by a larger vision and assures that individual changes fit together into a meaningful whole" (Shaw et al., 2012, p. 682). This overarching, larger vision provides organizational alignment, which is defined as "the synchronization of strategic goals with operations and execution tactics" (Shaw et al.,

p. 681). On the flipside, being misaligned is "any disconnect between the vision and ongoing change strategy of the organizational change champion and the intervention-specific goals and actions of the project champion" (Shaw et al., p. 681).

For this research study, the larger vision was the transformation of an organizational culture built on the organization's five values. The action research process identified eight different opportunities to further the culture transformation, of which four of these opportunities are currently being planned and implemented.

While there was alignment of the overall action research process and new employee experience project with the vision of the organizational culture transformation, the team member and internal partner responsibilities were not always in alignment with their job responsibilities and priorities. "Employees are tied up with their day-to-day work and cannot commit much time to participate in dialogue conferences and other similar activities" (Maurer & Githens, 2009, p. 288). As a result, I needed to support the team members' work priorities and schedules, knowing that not all team members would be available 100% throughout the project. Additionally, I needed to negotiate with internal partners regarding deliverables and timing. This is a key lesson learned, which is transferrable to other team and project opportunities.

Roles and Responsibilities. As the full-time director of culture and also the principal (and only) investigator in this research, my role was practitioner as researcher. My role as practitioner researcher allowed and required me to pay attention in a different way due to the dual commitments. I was motivated by my immediate goals as a practitioner, that is, to support the organization's culture transformation. I was also motivated by a long-term goal of contributing to the knowledge of action research and employee involvement to drive culture change.

"The relationship between researchers and research subjects is one of the crucial issues in action research" (Boog, Keune, & Lammerts, 1998). Van der Kamp (1996) suggested that the role of the researcher could best be described as an engaged and competent outsider. With this in the back of my mind from the beginning, I explained that this project would be their project. We started out strong by creating a collaborative group in which we connected and supported each other.

Throughout the project, we demonstrated the group development phases of inclusion, control, and intimacy. As the project moved on, however, we experienced scheduling difficulties, which contributed to the unpredictability for progress of the project. These scheduling difficulties (due to other organizational priorities) resulted in attendance and participation concerns. As a result, the team experienced some relationship building concerns, as people came in and out of the project. Those who stayed involved expressed appreciation and it is hoped, developed an insight into how research can make a change in the organization.

Changes in Resources. **"**Active participation is vital to the sense of ownership that encourages people to spend time molding the nature and quality of activities and behaviors in which they participate" (Stringer, 2007; Josif et al., 2012, p. 394). Ospina et al. (2004) coined the term "paradoxes of participation." Arieli et al. (2009) defined this as "a situation in which action researchers, acting to actualize participatory and democratic values, unintentionally impose participatory methods upon partners who are either unwilling or unable to act as researchers" (p. 275). Ospina et al. learned that "a mutual inquiry space requires a very honest conversation about roles, tasks, boundaries, authority, and power in the context of each particular project and as relationships are being built" (p. 66).

As the insider action researcher, I found myself contradicting the participative values I was trying to promote throughout the project. At times, I felt I created a kind of "pseudo-participation," a term used by Arieli et al. (2009). While we held frequent meetings, made decisions together, and created an open environment, I felt that I could have created a higher level of internal commitment.

However, this participation is impacted by the stability of team members. This is not unusual in team-structured research. Pololi et al. (2013) engaged five U.S. medical schools in a cross-school learning community from 2006 to 2010; they identified a challenge as "membership transitions," specifically noting that "unavoidable faculty turnover interfered with the continuity of relationships and created the ongoing need to integrate new members" (p. 254). When changes occurred within the team regarding their employment status, changes in their role, or challenges with time and prioritization, that challenged me as a leader to determine how to leverage the strengths and talents of the team members in the most effective way.

Implementation of Action within a Large Organization. Research suggested that change is difficult and often fails (Beckhard & Pritchard, 1992; Beer & Nohria, 2000; McLagan, 2003). The success rate of change initiatives is only about 30 percent (Balogun & Hope Hailey, 2004; Beer & Nohria, 2000; Cameron & Quinn, 2006; Franken, Edwards, & Lambert, 2009; Grover, 1999; Kotter, 1995; McKinsey & Company, 2008). However, Rogers et al. (2006) noted that the success rate for culture-change initiatives drops to 10 percent. The accumulation of failed changes often create cynicism within the organization, creating a cycle where subsequent change efforts become even more difficult to implement (Hammond, Gresch, & Vitale, 2011; Stanley, Meyer, & Topolnytsky, 2005).

The low success rate of organizational change is often due to implementation problems, rather than the change itself (Armenakis & Harris, 2009; Klein & Sorra, 1996; Kotter, 1995; Pollack & Pollack, 2015; Rogiest, Segers, & van Witteloostuijn, 2015). Because of the importance to success, scholars noted the criticality of the implementation phase of change management (Armenakis et al., 1993; Armenakis & Harris, 2002; By, 2005, 2007; Allen et al., 2007; Lines, 2007; By et al., 2008). While it is a critical change management phase, the success rates for most organizational change initiatives are very low, creating doubts about the various approaches used by scholars and practitioners (Bamford, 2006; Beer & Nohria, 2000).

Because implementation is crucial to the success of transformational change, Heckelman, Unger, & Garofano (2013) suggested that "culture change requires a planned and disciplined implementation cascade" (p. 25). Real and Poole (2005) advised that "without implementation, the most brilliant and potentially far-reaching innovation remains just that – potential. It is in the implementation that organizations perfect the promise of innovation. In implementation, organizations put ideas, designs, and visions to work" (p. 64). Realizing the importance of implementation in this organizational change, the team discussed and created an implementation plan. This plan was based on the team's established five principles for the project (see page 158), with added focus on how to implement action within a large organization by collaborating with internal experts and departments.

A large organization is a compilation of many smaller organizations. When conducting research and implementing action, it is key to understand the relationships between all the parts of the organization and the environment to see how everything fits together, as these parts comprise the larger system. “Effective implementation of change is dependent on a detailed understanding of work processes, relationships between organizational structure and functioning and informal distribution of power in the units affected by the change” (Lines, 2004, p. 199).

Pollack & Pollack (2015) highlighted action researchers as having the potential to greatly improve the implementation of organizational change. After months of best practice research, analysis, and planning, CART developed a three-phase implementation plan. To get to this point, the team had numerous discussions regarding the best practices of external organizations and internal departments, recommended changes to the current situation, resource needs to accomplish the goal, and why this project is important to the overall organizational culture transformation. In order to achieve our implementation goal, we contacted additional content owners and experts across the organization, as the planning and implementation of this work was part of a larger system and could not be done in isolation. Additionally, parts of our plan were best practices in other parts of the organization, so we tried to leverage their lessons learned to avoid duplicating efforts and problems.

While these connection points and partnerships were valuable, our major pain point in the implementation was the new employee data report, meaning the list of new employees and their hiring managers in a timely fashion to efficiently communicate to the new employees and hiring managers. Throughout the discussions with other colleagues across the organization, we discovered challenges with other similar reports. At times, we thought the delays were due to prioritization issues regarding other projects, but later realized that problems with the report format and available resources caused the delays.

Leveraging and Sharing Lessons Learned. The action research process is an "attractive option to management because it is characterized as being problem focused, involving change and aiming at improvement" (Badger, 2000, p. 201). "When organizations invest in these programs (cultural change), most often they want their employees to change so they are 'better' – better at service, better at problem solving, better at leading, etc. Essentially, they are trying to change the way people behave, i.e., changing the organizational culture or the way people do things at their place" (Enderby & Phelan, 1994, p. 74).

While organizations view the action research process as an attractive option, "a key issue that requires attention is that the action research study must have implications beyond the remit of the immediate project" (Coghlan & Shani, 2014, p. 532). This means that the knowledge generated and the lessons learned should be shared across the organization, and team members and the researcher are responsible to share these lessons learned from participation in the action research process.

In this research study, the way this occurred was dependent on the team member, and could include the use of communication vehicles such as oral presentations, discussions with leadership and department team members, and written reports.

Whatever the format selected, the main point was to establish the significance and importance of what the team members learned on a personal and professional level and how this information could be transferred to future changes and projects. Team members noted:

- *“I’ve been sharing my CART experience with my team as an example of successful collaboration, as well as driving progressive improvement. My team has benefited from my experience, and allowed them to reflect on how they could approach their daily work differently to provide a more positive outcome” and*
- *“I’ve been talking about the work and also about the team dynamics/skill bulding/relationship opportunities with my team.”*

While action research was a systematic way to gather and assess the organizational information, action research projects are situation-specific and use a wide range and levels of inquiry, activities, and methods (Coghlan & Shani, 2005; Reason & Bradbury, 2001). As a result, an action research study may not be replicable because of the particular situation or setting; however, “the learning needs to be transferable and the process may be transportable to other situations” (Coghlan & Shani, 2014, p. 533). Team member engagement in the action and reflection cycles, combined with workable outcomes, generated the actionable knowledge and learning. This knowledge and learning can be leveraged for other types of organizational change, as the action research process can be used for any type of organizational opportunity. “Corporate leaders are realizing that employee knowledge is a critical resource for competitive advantage and as such are encouraging employees to share this knowledge" (Amah & Ahiauzu, 2013, p. 670).

The transferability of the process was noted by team members, who suggested:

- *"I think this process can be applied to a variety of issues. I know this is a process I can apply to projects that I am working on as it is always important to be specific in scope, research the topic, and then take action" and*
- *"Action research is dynamic and seems to capitalize on incremental progress – we use information to take action along the way. This can be helpful in making progress even on complex projects."*

In this research study, the team identified eight opportunities to support the culture transformation. Researching and implementing one of these opportunities resulted in tangible results and success by completing the project. This was particularly important, as "research is preferred to have some tangible benefits" (Badger, 2000, p. 202). The team discussed the lessons learned, as well as the best ways to share these lessons across the organization. Team members were supportive of using an executive summary, which could be shared with their leadership team and colleagues. This summary would be enhanced by their specific lessons learned. Because team members are from different parts of the organization, the wide reach encourages considerable sharing of lessons learned across the organization.

Participant Development. "Research in an applied field such as HRD exists to impact, improve, influence, or enlighten practice" (Githens, 2015, p. 187). The opportunity to impact, improve, influence, or enlighten practice was a focus, as one of the objectives of this research study was to develop employees at a health care organization to better understand organizational culture and change management concepts to support this change and future changes.

A crucial characteristic of action research is "that the participants, stakeholders, and members of groups change as the inquiry evolves" (Burns, 2014, p. 9). This change in the participants and the stakeholders is because action research enlists the minds, hearts, and actions of people, which drive sustainable change (Thomson, 2015). Human capital is the greatest and the most valuable asset and the supreme advantage for any organization and it is the only asset that does not decrease by higher applications but rather it increasingly grows over time.

To encourage knowledge generation and participant development, the action research process included reflection as a specific process step. Reflection is a critical aspect of the action research process for both development and improvement purposes, helping participants become aware of our own assumptions, biases, and ideas. Additionally, the reflection process opens us to new ideas and feelings, which can lead to the possibility for new actions.

There are many different types of reflective practices that can be used within the action research process; the following were used throughout this action research study:

- Dialogue, problem exploration, and systems thinking (Smith, 2001);
- Individual and group process feedback (Conger & Toegel, 2003);
- Public reflection (Raelin, 2001); and
- Action learning conversations (Maltbia & Marsick, 2008).

Including reflective practice throughout the action research process required good time management, dedication to include reflection within meetings, and a plan for group and individual reflection, with ample time allocated for structured discussions over the process duration (Sofo, 2006; Sofo, Yeo, & Villafane, 2010). These structured discussions occurred during scheduled team meetings, in which team members participated in the group where “individual reflection is enhanced by group and paired collaboration” (Francis, 1995, p. 240). Additionally, unstructured discussions occurred in informal conversations with individual team members. Both structured and unstructured discussions ensured reflection throughout the 13-month process.

CART members were asked to reflect throughout the project, with feedback gathered twice – the first time after the development of the action plan and the second time after the program implementation and evaluation. This timing allowed members to reflect on the experience several months apart, which created a deeper awareness of the value of collaboration over a long-term project.

Feedback from CART members was collected in two ways: (a) anonymously completed feedback questions, which included questions to generate a better understanding of the six types of learning within the project; and (b) group discussion via a final team meeting to share their experiences and input for future opportunities.

The first individual team member reflection responses can be seen in Appendix P, while a summary of the responses appears in Table 17. The final individual team reflection responses can be seen in Appendix Q, with a summary of the responses appearing in Table 18.

Table 17

First Individual Reflection Responses

Reflection Questions	First Individual Reflection Response Summary
1. What is going well with the action research process?	Collaboration
	Networking across organization
	Transparent & honest discussions
	Research opportunities – first person vs. third person
	Work allocation - divide & conquer
	Stakeholder connections
	Creation of short- and long-term plans
2. What changes do you recommend for the action research process?	Broaden scope to include employees from outside headquarters
	Additional time for broader research
	Clearer expectations upfront
	Process has taken longer than expected
3. What have you learned to date through your participation in the action research process?	Strategies of other successful companies
	That we are leaps and bounds ahead of our competitors
	I learned information that I have now taken a 180 in my personal and professional opinion of our company
	The organization has transformed, but there are still opportunities
	Good reminder to be open to others' ideas, as what is important to one person is not
	Eye-opening to hear feedback from new employees
	More information about the frustrations and successes of new hires, managers, and existing employees
	Change is possible with valid data and a logical approach
	Team dynamics – need people who have time, can manage tasks, have the desire and energy to make things happen, and are self-aware
	Good reminder to ask questions and seek to understand
	Critical importance of a positive, vibrant, living culture in the workplace

4.	How will you apply your lessons learned in your current job?	Our company continues to be a leader in the way it treats new employees; the level of commitment the company places on ensuring new employees are introduced to the culture amazes me. My natural style and inclination is to do things by myself, independent of others. This has been a great reminder to me that collaboration is such a blessing and can truly lead to stronger ideas! Leverage collaborative model for future projects (team building). I've shared ideas with my leadership team who loved going beyond the typical onboarding concepts. Our department is looking at more ways we can touch them with our culture before they walk in the door. I will build more effective short-tem, adjunct teams based on what I learned working with this team. Leverage Human Centered Design when addressing problems. Onboard new hires using techniques discussed/learned via CART. I am beyond thrilled to have learned this information and continue to share it with other employees in the organization.
5.	How has participation impacted you on a personal or professional level?	I've enjoyed the opportunity to get to know others across the company and learn about something I wouldn't have had the opportunity to. Expanded knowledge of other areas of company greatly as well as my peer network. I've gained a little bit of courage and empowerment. This was a fun and rewarding experience. This was a great reminder of how strong we can be when we collaborate and come together. Reinforced importance of compassion in all aspects of life. My participation in CART is the sole reason I decided to stay with the company. As I look back on the work we've completed, I was reminded that our company IS committed to living up to its values. Embedding an effective, positive culture is critical…it's not just a "nice to have." This has made me more aware of the culture that I am reflecting. After being here for years you tend to look at some items as gravity issues, that you really can and should challenge. In this project we've looked at things that could be more supportive to our culture and request that leadership to make changes and that has changed my perspective personally and professionally.

Table 18

Final Individual Reflection Responses

Learning Types	Reflective Questions Asked	Summary Responses
Action learning	How can we do things differently in an action research process?	Pace/speed – bursts of progress alternated with waiting/down time Increased flexibility – be more nimble
	Have we taken the right course of action?	Yes, absolutely
Cognitive learning	What culture values or principles did we demonstrate? Provide specific examples aligned with our five values.	Compassion - examined the new employee experience from the end-user perspective Relationships – chance to meet and form relationships with employees across the company
	How can you apply our culture values to other situations or projects?	Apply values in every situation – personally and professionally Use in both project work and customer support
Behavioral learning	What will you do differently as a result of participating in action research?	Proactively identify and research improvement opportunities Embed culture concepts into projects Include employees for input and partnership
Experiential learning	How will you transfer your learning from this process to future projects or initiatives?	Include collaborative opportunities in future Utilize a broad, diverse team Leverage team member strengths for responsibilities
Organizational learning	How can you share your learning from this process and project with others for organizational learning?	Personal demonstration of changed behaviors Share information with my team
Problem-based learning	How can this process be used to assess problems and determine solutions?	Adopt customer-focused approach to improve solutions Practical – identify a problem and research it to make recommendations and take action Push to be more innovative – think beyond the norm

Insider Researcher Professional Development. "Nearly everyone in HRD is concerned with affecting practice, whether we are researchers or practitioners. However, we all have different philosophical orientations toward practice" (Githens, 2015, p. 1999). For example, some HRD professionals are focused on efficiency and production, while others are concerned with fairness, power, and social issues. Some want to affect top-down changes, and others want to actively implement small-scale or large-scale changes.

The two essential goals of all action research are to improve and to involve. "Action research aims at improvement in three areas: firstly, the improvement of a practice; secondly, the improvement of the understanding of the practice by its practitioners; and thirdly, the improvement of the situation in which the practice takes place. The aim of involvement stands shoulder to shoulder with the aim of improvement Those involved in the practice being considered are to be involved in the action research process in all its phases of planning, acting, observing, and reflecting. As an action research project develops, it is expected that a widening circle of those affected by the practice will become involved in the research process" (Carr & Kemmis, 1986, p. 165).

My professional goals for conducting this research were two-fold: (1) to advance the organization's large-scale culture transformation in a practical way and (2) to develop employees. The opportunity to lead an action research study made a substantial contribution to my level of practitioner professionalism. "Not only does critical action research help ensure that researchers do not become removed from organizations, but it also empowers practitioners to conduct their practice from a critical perspective" (Githens, 2015, p. 186). Of significance was a much deeper understanding of the action research process, itself, as well as the personal and professional competencies required to conduct an action research study. As an insider action researcher, I had the "opportunity to acquire 'understanding in use' rather than 'reconstructed understanding'" (Coghlan & Brannick, 2010, p. 101).

Oja and Smulyan (1989) highlighted the benefits of action research to professional development, particularly that enduring change in practice outlasts the research process, the participation in the action research process extends to future interests, and participation exhibits improved feelings of self-worth, confidence, flexibility, and receptivity to new ideas. This opportunity for development was particularly important to my professional development as a scholar-practitioner because "in an applied field like HRD, the risk of an area of scholarship becoming irrelevant to real-world practice is essential to consider" (Githens, 2015, p. 186).

Researchers noted that individuals who are scholar-practitioners are more effective than their non-scholar peers (Holton, 2004; Lombardozzi, 2013; Short & Shindell, 2009). "Beyond scholarly practice, professionals are often urged by the scholarly community to be more evidence-based, which presses them to both seek and produce more rigorous scientific evidence regarding the results of their practices as well as to apply the most recent research results in their fields (Hamlin, 2007; Rousseau & McCarthy, 2007)" (Lombardozzi, 2013, p. 315). While action research "is a typical part of most HRD programs, especially in organization development courses, it is not necessarily included in the professional preparation of professionals in other fields. Action research could easily be built into core courses of other fields" (McLean, Kuo, Budhwani, Yamnll, & Virakul, 2012, p. 258).

Within the action research process, the facilitator has considerable power. To understand how to use this power in a positive, appropriate way, I looked for suggestions and advice to lead action research. Leading an action research project required attention throughout the project to four factors: "(1) how the context is assessed and captured; (2) the quality of collaborative relationships between researchers and members of the system; (3) the quality of the action research process itself as cycles of action and reflection are enacted and simultaneously capturing the issues that emerge while carrying out the research in the present tense and (4) that the dual outcomes reflect some level of sustainability (human, social, economic and ecological) and the development of self-help and competencies out of the action and the creation of practical knowing from the inquiry" (Coghlan & Shani, 2014, p. 533).

In order to lead an action research project, Chambers (2005) suggested five behaviors for researchers: "learning not to put forward one's own ideas, learning not to criticize, learning to keep quiet and not interrupt, relaxing and not rushing, developing rapport" (p. 163). These suggested behaviors were challenging for me at times, as I often wanted to suggest ideas or push the team for a faster pace. However, having these behaviors in the back of mind helped me partner with the team members and other internal experts to leverage their ideas and strengths, rather than imparting my perspectives. Helping to support these five behaviors were process suggestions by experienced researchers Holian & Coghlan (2013), who noted the importance of four process imperatives for action researchers. They suggested that the researchers:

- be attentive (to the data);
- be intelligent (in inquiry);

- be reasonable (in making judgments); and
- be responsible (in making decisions and taking action) (Holian & Coghlan, 2013, p. 414).

Zhang et al., (2014) noted that as doctoral students who used action research in professional education in different disciplines, "one of our main problems trying to 'become action researchers' – we have been educated (in earlier education and in Ph.D. courses) to be technical researchers doing research 'on' instead of 'with'" (p. 309). This was a substantive opportunity to stretch myself to understand how to do research "with" others, as this would highly benefit my professional research and change management opprotunities within the organization.

Throughout the research project, I kept a research journal in which I made 64 journal entries, which highlighted my personal experiences, emotions, and concerns throughout the process. My journal was highly valuable, as it allowed me to review my own biases and beliefs, where we made progress, and where we got hung up on some things. It also helped push me to continue the project, even though at times it felt like the project stalled, and I felt personally responsible to turn that around. These feelings existed because "passion is integral to doing action research" (Pine, 2009, p. 238).

The process of conducting action research is deeply personal and emotional. The coordination working with many functions, leaders, and the team was complex and elicited many emotions throughout the project, which could potentially be drawn as a roller-coaster, with its ups and downs. At the beginning of the project, I was highly concerned with understanding the methodology of action research and ensuring that I followed a particular model. This was extremely important at the beginning to ensure a solid foundation for the research and build my confidence as an action researcher. Even with this understanding and framework, I was constantly questioning myself, my interpretations of events and discussions, and my use of authority and control. I found myself needing to work through numerous insecurities and misperceptions throughout the process. I had high expectations of myself to do it right, which at times led to the fear of failure.

Reflecting on this, I realized that this opportunity had great power within the organization to transform people's learning and development, while creating a practical solution to an organizational problem. The team members were highly excited to be part of creating a solution that would impact the organization. The senior leaders were very supportive of creating an updated onboarding process. My direct leadership was highly engaged and provided feedback and guidance to leverage internal resources. My fear of failure was just that – MY own fear of failure. What I realized was that support and help was surrounding me on a daily basis and was always there when I needed something.

"Doing action research in your own organization involves (1) clarifying the action research project in terms of both your and the system's commitment to learning in action, and (2) managing issues of role and secondary access" (Coghlan & Brannick, 2010, p. 113). Insider action research "is centered on the process whereby the action research is conducted by a full member of an organizational system, rather than by one who enters the system as a researcher and remains only for the direction of the research" (Holian & Coghlan, 2013, p. 400). The project selected by the team, the insider action researcher, and the organization leaders was an opportunity needed within the organization.

Coghlan & Brannick (2010) noted that "doing action research in your own organization is opportunistic, that is, you may be selecting an issue for research which is occurring anyway, irrespective of whether or not your inquiry takes place" (p. 102). Admittedly, this was the case with this project – an updated onboarding initiative was definitely needed within the organization. However, there were also many other ideas generated by the team that were considered beneficial and under consideration for implementation within the next 1-2 years.

The onboarding project was a highly visible, complex topic due to its many connection points with other departments and functions within the organization, thus operating within a larger system. For example, the project had connection points with the recruiting function, the communications function, the organization-wide onboarding process, and human resources within the businesses. This complexity is often typical for action research projects, as "the puzzles and dilemmas of interest to insider action research practitioners are messy, complex and networked, difficult to describe and control, and not easily operationalized, estimated, or measured" (Holian & Coghlan, 2013, p. 401). This is why the onboarding project was a good, challenging action research project, as it provided the opportunity to gather input and feedback directly from employees and participants, as well as gave the participants the chance to work on a large, complex project.

Insider action research has three specific advantages:

- Knowledge of everyday life and informal structures of an organization. Organizations lead two lives – formal and informal. The formal or public life is presented through its formal documentation including its mission statement, goals, assets, resources, annual reports, and organizational charts. The informal or private life is considered experiential, in that it is the life as experienced by its members through its cultures, norms, traditions, and politics. "In their informal lives, organizations are centers of love, hate, envy, jealousy, goodwill and ill will, politics, infighting, cliques, political factions and so on – a stark contrast to the formal rational image that organizations tend to portray" (Coghlan & Brannick, 2010, p. 114-115). This informal structure provides information about the "unwritten rules" of the organization, what can and can't be talked about within the organization, the internal jargon, and the informal grapevine of information or gossip.

- Collaborative research. Organizations provide opportunities that involve "shared exploration between practitioners and researchers to improve the performance of a system and to add to the broader body of knowledge in the field of management" (Coghlan & Brannick, 2010, p. 102). An insider researcher engages in: first-person research through the understanding of organizational knowledge for professional and personal development; second-person research through work on practical issues with colleagues and senior leadership; and third-person research by increased understanding and theory as a result of the experience (Coghlan & Brannick, 2010).
- Access to and familiarity with information, data, or internal resources. Access, in essence, means gaining the right of entry to information and data within the organization. This access is necessary to understand and be able to leverage the tacit knowledge of employees. The opportunity to access this

tacit knowledge is a competitive advantage of action research because "academic researchers cannot get direct access to this know-how through questionnaire surveys" (Ballantyne, 2004, p. 328). Two major aspects influence an insider's access: (a) a shared interest in the potential outcome of the research project; and (b) mutual trust, which can sometimes be difficult because action research may lead to changes that potentially destabilizes the status quo of an organization.

While insider action research has many advantages and opportunities, it is challenged with practical issues within an organization's context and seeks to understand these issues through iterative processes, rather than sequential steps which can be planned and easily managed. Challenges of insider research include:

- Knowledge of the organization. For an insider action researcher, having knowledge of the organization and the internal networks can be an advantage. However, it can also be a disadvantage because of the challenge to stand back and detach from the situation in order to assess and critique the research. Having solid knowledge of the organization may also result in making assumptions regarding what is going on and not probing as much as you may if you wouldn't be as familiar with the organization. Additionally, with an insider's knowledge you may think you know the answer and choose not to challenge the current thinking to identify other options or solutions.
- Access to data and information. As an insider, it may be more difficult to obtain relevant data because of the need to politically work across

departmental, functional, or hierarchical lines or may be denied deeper access to data which may not be denied as an outsider.

- Courage to address issues. Insiders are also challenged by the need to be honest about their own perspectives and be open to potentially disconfirming evidence, which may raise red flags in the organization. "You may need to be in tune with your own feelings as an organizational member: where your feeling of goodwill are directed, where your frustrations are and so on" (Coghlan & Brannick, 2010, p. 115).
- Time limitations. As an insider, there is pressure to complete projects in a timely way with the highest quality possible. This means that there is a fine balance between accomplishing work and putting the rigor into an action research project.
- Power positions. Organizations operate by distributing authority and establishing opportunities to exercise power, which are important to individual motivation and in organizational relationships. Being aware of and sensitive to "the strengths and limitations of people in decisions on power distributions can improve the quality of organizational life" (Zaleznik, 1970, p. 48). Furthermore, insiders are often aware of organizational politics, which may be potentially good or bad. While awareness of politics is good, it must be balanced to not interfere with research, decision making, and taking action, as personalities and politics often have a significant, overriding impact.

Throughout the process, I have been able to develop personal strategies to overcome negative emotions and develop more positive emotions through positive behaviors. I personally committed myself to the reflection process and sought feedback from numerous places throughout the process, including team members, colleagues, and leadership. I realized that a main challenge was how to foster autonomy without being too controlling, while on a timeline to implement an organizational solution and complete this research. I needed to view many of the activities as “development opportunities” versus the “expertise” that I had traditionally demonstrated in the organization.

Action research was the method most suitable for this research because of its situational, collaborative, participatory, and self-evaluative nature. This action research study focused on collaboration in research (between the facilitator and the stakeholders) and the creation of change on a local level (Stinger, 2007). This project team had the opportunity to define the overall project scope and the focus of the change or improvement. Having identified numerous improvement opportunities, the team focused on one opportunity to implement and evaluate. By focusing on the desired outcome to support the culture transformation, the team was able to implement changes by combining employee involvement and participation with an organizational change to further the culture transformation.

Insider Researcher Personal Development. My personal goal for conducting this research was to make a difference through a practical approach that would advance a culture transformation, while developing employees. Undertaking an action research project for the first time and introducing it to the organization as a culture transformation change strategy was a journey. It engaged my values, my beliefs, my doubts, and my emotions. As action researchers, Postholm and Skrovset (2013) noted that “the researcher has a multifaceted role which will challenge her cognitively and emotionally”

(p. 506). I can certainly understand and appreciate their perspective, as the project involved my whole self – as an employee, an academic researcher, a culture leader, a practitioner, and a colleague.

Throughout the project, my main emotions included excitement and anxiety. I was excited because I was helping to create an improved new employee experience through collaboration across the organization with numerous employees and functions; develop others' skills in research and development; develop my skills to conduct an action research project; and create new materials and processes to support managers and new employees. I was anxious because this involved experiencing the action research methodology for the first time, gaining support from leaders and resources across the organization, and scoping the project in a way that was manageable in an organization that leans toward complex solutions. Additionally, I wanted to remain an employee with the organization within my desired career when I completed the research, so there was pressure for me to balance driving a successful project and conducting academic research.

Implementing an action research project was challenging, as it pushed me as a leader to consider and document every action and decision to drive for change. "Critical action research is ideal for those who want to be actively involved in making changes and are concerned with HRD's role in larger societal issues" (Githens, 2015, p. 200).

My competencies and self-confidence were tested and challenged throughout the action research process. Postholm and Skrovset (2013) eloquently highlighted these competencies and the experience of an action researcher. "The action researcher must have a high degree of self-respect, confidence in herself and the will to continue and not yield in the face of some opposition. The researcher must be honest, not least to herself, and emotionally receptive to impressions and expressions, thus functioning constructively in the exploratory partnership. The researcher must allow the work to be process driven and must be prepared to unexpected events. This means that the researcher will not have complete control over the process and what happens, but rather must accept surprises and listen with patience, and be open, creative and responsive. The researcher gains authority, influence and trust through her competence" (Postholm & Skrovset, 2013, p. 517).

I am grateful for the chance to lead an action research process, as it made me think about opportunities for additional action research potential within the organization. "That next generation of researchers who often only come to action research after many years of being trained to think of research and knowledge generation as the exclusive bailiwick of a small group of well-credentialed researchers and are then so grateful to discover a form of research more consistent with their values and interests when they happen across action research" (Brydon-Miller & Coghlan, 2014, p. 231).

Heron and Reason (2008) posited that developing critical subjectivity is where the researcher becomes aware of all aspects of knowing, which contributes to more intentional action. The development of critical subjectivity involves using the four ways of knowing (Heron & Reason, 2008): experiential knowing, presentational knowing, propositional knowing, and practical knowing. My personal development of critical subjectivity did not occur in a clean, linear process; rather, similar to action research, the development was fluid and emergent. "The knowledge, insights and experience of the insider researcher apply, not only to the theoretical understanding of organizational dynamics, but also to the lived experience of you own organization" (Coghlan & Brannick, 2010, p. 114). "Personal experience and knowledge of your own system and job comprise a distinctive preunderstanding for the insider researcher" (Coghlan & Brannick, 2010, p. 114).

The fact that an action research project supports both practitioner and academic needs provided pressure to succeed, as the research was the basis for my dissertation which I wanted to successfully complete, while the project was highly needed and visible within the organization. As a result, leaders were expecting a highly developed onboarding program to improve the new employee experience, while supporting our cultural journey. Being able to provide a positive new employee experience was one of the best opportunities to demonstrate and support our culture transformation.

Recommended Further Research

Research suggested that change is difficult and often fails (Beckhard & Pritchard, 1992; Beer & Nohria, 2000; McLagan, 2003). The success rates for most organizational change initiatives are very low, creating doubts about the various approaches used by scholars and practitioners (Bamford, 2006; Beer & Nohria, 2000). Of particular concern is that the success rate for culture change initiatives is only 10 percent (Rogers et al., 2006). With such a low success rate, this means there is considerable work being done in organizations that is not effective. Unfortunately, these efforts may result in doubt and cynicism, which may negatively impact the success rates of future organizational changes.

This study used the action research process as a research methodology to further the organizational culture transformation and to develop employees, which proved successful. However, very little research exists regarding the use of action research for culture changes. Action research holds considerable potential for knowledge generation in a complex industry, organization, or topic such as culture transformation, so I recommend its use for culture studies.

This study implemented phase one of a three-phase approach to demonstrate action in a large organization by using action research as a methodology. Zhang et al. (2014) recently noted that "indeed, action research in the professional realm has proliferated in recent years" (p. 295). While the use of action research has increased recently, its use is still relatively limited within large corporate settings, as it is more often used in educational settings. As a result, there are opportunities to apply the action research process to large organizational opportunities to generate knowledge and theory in these large settings.   The action research process is a good way to engage academia and practitioners in a research study that will benefit organizations, their employees, and the academic community.

Additionally, organizations seek practical solutions within a condensed timeframe to achieve a competitive advantage, which lends itself to short-term wins These short-term wins could be action research projects, which are implemented in phases similar to this study. However, it would be beneficial and interesting to conduct research over several years to assess the long-term results and sustainability of action research solutions. "Action research is a diverse family of related processes that draw on various methods and tools to achieve change" (Dick, 2015, p. 441). The use of action research as a methodology has increased recently, as scholars have acknowledged its value. Consequently, I recommend reviewing how action research is embedded within graduate programs to prepare future researchers and scholar practitioners. “The university is a critical site for the continued development of action research” (Brydon-Miller & Coghlan, 2014, p. 231). Furthermore, “there is nothing more imperative at this moment in the history of action research than to prepare the next generation of colleagues to assume leadership roles in our organizations and university-based research centers” (Brydon-Miller & Coghlan, 2014, p. 231).

Limitations

This study used action research to describe, interpret, and explain change management, while executing a culture transformation aimed at process/program improvement and employee involvement. This study was a participatory group activity, based on a partnership between the employee participants and the action researcher. The process was both educational and empowering, in which problem identification, planning, execution, and evaluation were interlinked. Knowledge and development of the employee participants and the action researcher were advanced through participating in and reflecting on the research process.

While there were numerous benefits for the employee participants and the organization, it must be noted that a limitation was gathering and analyzing data at the one organization with a specific group of employees in a health care organization based in the Midwest. While the participants were from different departments/functional areas, they are all employed by the same health care organization. Additionally, the team size was a very small representation of the large organization. As a result, the outcomes and impacts were dependent specifically on the health care organization where this research process was conducted, the employee participants involved in this action research process, the health care organization's leadership who supported this research, the academic committee who provided guidance and direction for this research process, and the action researcher who conducted this study.

This was an attempt within a health care organization to discover how an intervention can be designed and implemented to result in a measurable change during the specific, short-term time period in which the study was conducted. During this time period, the organization was subjected to competitive challenges and economic pressures that may not be representative of other organizations or industries. Due to the participants in a single organization at a particular time, the results are not generalizable to other industries or organizations.

Action research builds on the past, but takes place in the present with the goal to shape the future. Because of this timeframe and goal to shape the future, "engagement in the cycles of action and reflection perform both a practical and philosophical function in its attentiveness and reflexivity as to what is going on at any given moment and how that attentiveness leads to decisions and choices and yields purposeful action" (Coghlan & Shani, 2014, p. 526).

Action research projects are situation-specific and may not always create universal knowledge, as action researchers know that not every situation will behave as the one studied. However, the ability to extrapolate from a specific situation to more general situations is crucial by focusing on significant factors that may be useful for other organizations experiencing similar types of change. "While an action research intervention may not be replicable as the exigencies of a particular situation may not always be repeated, the learning needs to be transferable and the process may be transportable to other situations" (Coghlan & Shani, 2014, p. 533). How the participants are engaged in the action and reflection cycles within a specific situation, combined with workable outcomes, generate the actionable knowledge and learning.

Conclusion

With today's competitive landscape, organizations are eying ways to create a competitive advantage for organizational success and growth. Health care organizations are particularly challenged, due to the recent health care reform changes, combined with considerable competitive challenges. "The traditional models of change management that served organizations well during the old normal are no longer sufficient to guide them through the types of changes they are facing today. The new normal calls for different theories of change and changing" (Worley & Mohrman, 2014, p. 221).

The need for on-going change within the health care industry will continue due to potential changes in legislation. With just a couple months until the 2016 U.S. Presidential election in November, " the Affordable Care Act (ACA) is destined to once again become the focus of media attention, policy analysis, and political rhetoric" (The Lancet, Oct 24, 2015, p. 1599). As a result, there may be additional changes depending on the result of the upcoming election.

"In the new normal, fundamental change never ends, and it is better viewed as something to be catalyzed and steered" (Worley & Mohrman, 2014, p. 221). This need to catalyze and steer organizational change may help the success rates of change efforts, which are estimated to be a dismal 10 to 32 percent success (Smith, 2003). Furthermore, organizational culture changes prove even more challenging, with only a 10 percent success rate.

To ensure a higher success rate for a culture change, this study used the action research process as the research methodology to support its on-going culture transformation and to develop employees through experiential learning. With a team of eight employees called the Culture Action Research Team (CART), we identified eight different opportunities to further the culture change. We narrowed the scope to implement one initiative focused on the new employee experience to welcome new employees and provide helpful organizational information. We leveraged the Plano Clark & Creswell (2015) eight-step action research process to guide the research study. Through the steps that covered the situation analysis, data collection and analysis, ideation, and reflection, team members implemented phase one of a three-phase change plan. Team members reflected on the 13-month experience, noting that it was a valuable experience that they can leverage in future projects. Of particular value was the opportunity to create relationships and work with employees from across the organization.

The most important feature of action research is that "it shifts its locus of control in varying degrees from professional or academic researchers to those who have been traditionally called the subjects of research" (Herr & Anderson, 2005, p. 2). This focus on participation serves several purposes, "among them empowerment of those involved, a commitment to equity, information sharing among the various stakeholders, and building commitment to the planned actions" (Dick, 2015, p. 434-435).

The research study resulted in both positive and negative lessons learned. Additionally, the team identified enablers (employee involvement, systems thinking and practice, senior leadership support; champions within the business; and communications) as well as barriers (resistors and matrix environment within a large organization) that are helpful to understand for future change efforts.

The purposefully diverse project team worked hard and developed ease to share and learn together in a collegial spirit to attain the shared goal of furthering our culture transformation through the new employee experience project. Because of the comfortable atmosphere we developed, the team was comfortable sharing information, challenging one another, and incorporating fun throughout the process. The work to collaborate across an organization, coordinate a group of employees to create updated processes and materials, and implement change to support our culture transformation was rewarding.

I believe that CART achieved its purposes to further the organization's culture transformation and to develop employees at a health care organization to better understand organizational culture and change management concepts to support this change and future changes.

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Appendix A – Consent Form

Using Action Research to Support an Organizational Culture Transformation
Consent Form

You are invited to participate in a research study of organizational culture transformation. You were selected as a possible participant because of your role with the company and your support of the organizational culture transformation. Please read this form and contact me if you have any questions before agreeing to be in the study.

This study is being conducted by Jane Kuhn, a doctoral student in the Human Resource Development program in the Organizational, Leadership, and Policy Department at the University of Minnesota.

The purpose of this study is to create culture champions across COMPANY NAME to support and drive organizational culture change across the organization, as employee involvement below the top layers is shown to be more successful than top-down direction only.

As a participant, you benefit through:

1. personal and professional development by learning research processes, data analysis, subject knowledge, and decision making;
2. creation of employee and leadership networks;
3. visibility and interaction with senior leadership and project sponsors; and
4. opportunity to identify and implement solutions to provide business value and impact performance.

The organization benefits through:

1. furthering knowledge of the action research process and its use within a corporate setting, as many action research processes are currently conducted within an academic setting; and
2. understanding the use of action research as a professional development tool for employees within a corporate setting.

If you agree to be in this study, you will participate in a group of approximately 8 employees to identify opportunities to strengthen our culture and embed our values within the organization.

Participation in this program poses little to no risk to participants. To protect participants' welfare, no feedback will be provided to management/leadership. This will minimize any chance of potential negative impact to the participants' work environment. The records of this study will be kept private. Any information shared in the dissertation or with the organization will not include any names, so it will be impossible to identify a participant. Only the researcher will have access to the records.

If you agree to participate, you must be given a signed copy of this document and a written summary of the research. If you request, you will receive the research results, which will provide information about corporate culture, change management, and action research.

You may contact *Jane Kuhn*, Student Researcher, at XXX-XXX-XXXX any time you have questions about the research. You may contact *Dr. Shari Peterson*, University of Minnesota Advisor, at XXX-XXX-XXXX if you have questions about your rights as a research participant.

Your decision whether or not to participate is voluntary and will not affect your current or future opportunity with the organization. If you decide to participate, you are free to withdraw at any time without affecting any relationships.

- -

Statement of Consent

I have read the above information. I consent to participate in this study and grant permission to be contacted by the researcher for scheduling purposes.

Signature of Participant ______________________________________ Date _____________

Signature of Researcher ______________________________________ Date _____________

Appendix B - CART Meetings

Meeting Date	Topic(s)	# of Attendees (including researcher)
6/18/15	Team Formation, Overview of Research	8
7/9/15	Action Research Phases, Idea Generation	8
7/30/15	Idea Updates – Best Practices, Real Estate, Talent Acquisition	8
8/3/15	Talent Acquisition Process – Interviewing, Onboarding	8
8/24/15	Updates – Real Estate, Talent Acquisition Debrief	6
9/4/15	Culture Overview	7
10/9/15	Updates - Real Estate, Talent Acquisition, Mission Focus	6
10/29/15	Project Updates, Change Management Overview	6
11/13/16	Culture Overview & Update	6
11/30/15	Updates – Onboarding, Internal Acquisition, Real Estate	6
12/10/15	Updates – Onboarding, Real Estate, Internal Acquisition; Action Research Process Overview (8 steps)	5
1/4/16	Onboarding Focus Group Questions	3
1/7/16	Onboarding Focus Group Questions	2
1/8/16	Updates – Onboarding, Internal Acquisition, Real Estate	4
1/22/16	Focus resources on one project	5
2/5/16	Onboarding Focus Group Results	5
2/26/16	Focus Group Themes, Employee Engagement Comments, Communications Next Steps	5
4/8/16	Communications & Creative Theme Review, Next Steps	6
4/29/16	Creative Theme Review, Discussion of Research Questions	4
5/11/16	Process Status, Next Steps	4
6//15/16	Process Status, Next Steps	5
7/29/16	Final Review	6

Appendix C - Extended Meetings (with employees and CART team members outside the CART meetings)

Meeting Date	**Topic(s)**	**# Attendees (including researcher)**
12/7/15	New Hires & Hiring Managers	4
12/7/15	Focus Group Questions	3
1/11/16	Onboarding Internal Best Practices	14
1/13/16	Employer Value Proposition	5
1/14/16	Internal Best Practices Review & Debrief	10
1/20/16	Focus Group Plan & Questions	3
1/25/16	Debrief on First Focus Group	3
2/2/16	Employer Value Proposition Communications	2
2/5/16	New Employee Experience Communications	3
2/8/16	Employer Value Proposition Communications	6
2/11/16	Focus Group Results	5
2/25/16	Business Liaison Role per Focus Group Feedback	5
2/29/16	Sr Leader Discussion – Focus Group Results/Recommendations	3
3/2/16	Organization-wide Orientation	3
3/7/16	Behavioral Interviewing Alignment with Culture	2
3/9/16	New Employee Organizational Communication	2
3/14/16	Human Resources Communications	2
3/16/16	Departmental Orientation	2
3/16/16	Creative Theme Initiation	4
3/23/16	Communications	2
3/29/16	Employee Engagement Feedback	2
3/30/16	Communications	2
3/30/16	Departmental Orientation	2
4/6/16	Creative Theme Options	4
4/7/16	Senior Leader Orientation Alignment	2
4/8/16	Cross-organizational Update	2
4/11/16	Communications	2
4/11/16	Creative Theme Options	2
4/13/16	Organization-wide information	2
4/14/16	Creative Theme Options	2
4/18/16	Communications	2
4/21/16	Communications	2
4/21/16	Creative Theme Next Steps	2
4/26/16	Creative Theme Review	7
4/27/16	Recruiting	2
4/27/16	Legal – Employment Law	2
4/27/16	Creative Theme Clarification	2
4/29/16	Employee Relations	2

5/3/16	Senior Leader Sponsorship	2
5/6/16	Senior Leadership Review & Approval	2
5/9/16	Communications Plan	2
5/16/16	Creative Materials Review	5
5/23/16	Total Rewards Communication	2
5/26/16	Creative Materials Review	4
6/1/16	Creative Theme Review	3
6/1/16	Communications Plan & Progress	3
6/15/16	Communications Plan	2
6/21/16	Communications Update	2
6/28/16	Distribution - List	2
6/29/16	Distribution – Vehicle	2
7/5/16	Communications Final Edits	2
7/6/16	Presentation to Communications Team	25
7/8/16	Measurement	2
7/12/16	Communications Cascade Plan	2
7/13/16	Reporting	2
7/14/16	Reporting	2
7/18/16	Measurement	2

Appendix D – Focus Group Questions of 2015 New Employees

Opening Script

Company/Business Focus

- What questions did you have during your first 30, 60 90 days in your new role?
- What do you "wish" you would have experienced in your 30, 60 90 days in your new role?
- What surprised you most – good and not-so-good – when you joined the Company?
- When/how did you learn about
    - our company's business
    - our mission
    - our culture

Tools

- Did you use the new employee checklist on the website?
- Did you attend the new employee orientation session via WebEx?
- What questions did you have before the orientation?
- What questions did you have after the orientation?
- How would you rate the effectiveness of the orientation webinar?

Culture Focus

- How would you describe our culture?
- Who do you hear/see talking about our culture and shared values (colleagues, manager, senior leaders, executives)?
- Where do you get most of your information about our shared values/culture?
- In your daily routine, what values to you see / not see being modeled? Can you share examples?
- When you were being recruited, did the recruiter or the hiring manager talk about the culture? How? When?
- During the recruiting process, do you remember hearing about our Employer Value Proposition – this is the 10 promises we communicate to employees?
- How would you compare or contrast the culture here to the culture of the company you were part of before joining the company?

Improvement Opportunities

- What would you change to make it easier for you to orient to the company/your team?
- What suggestions do you have for improving the onboarding process here?

Closing Script

Appendix E – Focus Group Questions of 2015 Hiring Managers

Opening Script

Tools

- What tools do you find most useful as a manager in onboarding new employees?
- Do you use the checklist and resources on the website?
- Does your recruiter help you with getting access to the right tools? If so, how?
- What tools do you create yourself for onboarding?

Employee Focus

- What questions do you most often hear from new employees?
- When do you typically talk to new employees about
    - our company's business
    - our mission
    - our culture

Culture Focus

- How would you describe our culture?
- Who do you hear/see talking about our culture and shared values (colleagues, manager, senior leaders, executives)?
- In your daily routine, what values to you see / not see being modeled? Can you share examples?
- Where do you get most of your information about our shared values/culture?

Improvement Opportunities

- What would you change to make it easier for you to orient new employees to the company/your team?
- What suggestions do you have for improving the onboarding process here?

Closing Script

Appendix F – Focus Group Questions of Business Liaisons

Opening Script

Role & Tools

- What is the role of a BL in onboarding new employees (e.g., IT/equipment, meet at front desk, tours, go-to for most things)
- What are the initial "must have" tools for new employees?
- Do you direct employees to use the new employee checklist on the website?
- Do you help ensure they attend the new employee orientation session via WebEx?
- What questions do new employees typically ask you before they attend orientation?
- What questions do they have after the orientation?
- What feedback do you hear about the effectiveness of the orientation webinar?

Company/Business Focus

- What questions did you most frequently get from new employees during their first 30, 60, 90 days in a new role?
- What surprises you most – good and not-so-good – when new employees join the company?
- How do you help new employees learn about
  - our company's business
  - our mission
  - our culture

Culture Focus

- How do you describe our culture to new employees, friends, family, etc.?
- Who do you hear/see talking about our culture and shared values (colleagues, manager, senior leaders, executives)?
- Where do you get most of your information about our shared values/culture?
- In your daily routine, what values to you see / not see being modeled? Can you share examples?
- Are you familiar with our Employer Value Proposition – this is the promises we communicate to employees?
- How would you compare or contrast the culture here to the culture of the company you were part of before joining the company?

Improvement Opportunities

- What would you change to make it easier for you to onboard employees to the company/your team?
- What suggestions do you have for improving the onboarding process here?

Closing Script

Appendix G – Focus Group Feedback from New Employees

<u>Onboarding questions for Employees</u>

Company/Business Focus

What questions did you have during your first 30, 60 90 days in your new role?

- New to him – didn't know – constantly learning – soaking it in – positive for the most part
- How we interact across the company with other segments – how to navigate - very different from other companies
- How groups or people work together work across the organization
- how to use some tools – hr direct, appreciation tool (training was helpful of those) – understand the culture of the entire co., not just the division
- Logistics of leadership – forms, processes, lexicon, etc.
- Where do I fit in?

What do you "wish" you would have experienced in your 30, 60 90 days in your new role?

- Having onboarding online was very impersonal and difficult to feel connected
- What helped – people who started at the same time connected – BL helped connect the new people on the same floor
- computer system – when did training, anything from central group was not close and had to send in error tix – happens on a frequent basis – has been happening for great than a year
- wrap head around the big picture – military – no healthcare experience – tried to explain the matrix – drinking from the firehose – tough to process so much information
- Understanding how my piece rolls into the big picture flows up to the company
- Grasping overall structure of company – who reports to whom – can't find any larger scale org charts – helpful to have and have had at previous companies
- New employee orientation – very helpful – webinar – would be nice if the presentation could be made after the webinar
- Acronyms – link sent to him by someone sending to him

What surprised you most – good and not-so-good – when you joined COMPANY NAME?

- A lot of the meetings are held via webex vs conference rooms
- Preference to have webex mtgs instead of meeting in conference rooms
- Best way to retain top talent is to connect – talking through the phone is lonely –
- Such a strong telecommuting culture – how to incorporate – teambuilding
- Good – how much online training is available – nice organized list
- Environment more casual than previously – NICE
- HRdirect interaction – pleasant surprise to have that support – quickly and in a variety of forms – examples, leadership questions – dealing with employees, standard policy, etc. – and is consistent
- Surprised how nice everyone was – and continue to be outgoing and nice – pretty cool
- Second that – came from another corporation that was much more rigid than other location
- Everyone in department very congenial

When/how did you learn about

- **our company's business**
- **our mission**
- **our culture**

- through required trainings – new employee orientation, Learnsource courses, backed up by introductions with team – within about 60 days
- Town hall meeting on core values – boss and his boss talked about culture values

Tools

Did you use the new employee checklist on the website?

- NO
- Received a bunch of e-mails noting required training
- Telesales – were in the same room together – different experience – got to know everyone right away
- YES – and was a detailed Powerpoint for new people – MARKETING dept
- Yes
- Yes
- Yes
- Very helpful

Did you attend the new employee orientation session via WebEx?

- YES
- YES
- YES
- NO – had an in-person orientation through telesales
- Yes
- Yes
- Yes
- Didn't find the orientation helpful – distracting to see people drawing moustaches, etc.
  2nd person said that it was annoying

What questions did you have before the orientation?

- Try to learn everything – was so new
- Trying to absorb everything
- What the heck am I doing?
- What expected to do?
- Culture
- Timeline of acquisitions, how company evolved
- Logistical things

What questions did you have after the orientation?

- Very helpful
- Good to know resources were available – HR – can chat or call, very reassuring
- Did not find very helpful – had already found – was expecting more personal connecting when onboarding
- Organizational structure
- Org structure – how we're constructed

How would you rate the effectiveness of the orientation webinar?

On a scale from 1-10

- 3
- 8
- 7
- 7
- 8
- Mixed
- Overall good, exceptional
- Good

Culture Focus

How would you describe our culture?

- Disconnected
- Great – came from a culture that was not great – see a lot of positive actions
- Different teams have different vibes
- Positive environment
- Sales – adherence – shoot from the hip
- Great place to work – great culture to be a part of
- Friendly
- Professional, approachable

Who do you hear/see talking about our culture and shared values (colleagues, manager, senior leaders, executives)?

- Don't hear people talk about it
- NO – continues to be a focus on execution and results
- town halls – executive leaders – incorporated into daily conversations – good to have within performance management conversations
- Boss – daily or at least weekly
- Nearing end of second month, but are naturally part of the introductory conversations

Where do you get most of your information about our shared values/culture?

- Company website
- A colleague who is a culture champion
- Usually a manager
- Company website, than to a manager
- Company website to look at monthly snippets on culture

In your daily routine, what values to you see / not see being modeled? Can you share examples?

- Innovation – social media, digital – new ideas, no =one is playing in old world
- See modeled - always a bit of variation because of experience
- Yes, people ask for help from others – pretty good culture

When you were being recruited, did the recruiter or the hiring manager talk about the culture? How? When?

- Yes, recruiter – to prepare for contrast from company coming from
- NO – recruiter – tough spot – hard to get a hold of people – EE was aggressive – right down to the wire to start only about 4-5 days in advance
- Recruiter very descriptive in the culture – she reached out to him, so maybe that was part of the script
- Recruiter was great to describe culture and values – knew it was going to be a great fit
- Agree – nice to know the values up-front to ensure that you're a good fit – appreciated the communication up front and the visibility before joining to concur that was the place to go

How would you compare or contrast the culture here to the culture of the company you were part of before joining the company?

- More strict – regulatory – everything is time bound – an issue
- Plus – living flexible schedules – helps
- Conservative dress code
- Disconnected – not always aligned – looking out for own business goals – not aligned
- More professional – not as laid back – dress code, socially
- More collaborative – more mature – not as many junior people
- Put money where mouth is – consistent in actions and our words
- Similar

Accepting then start date – what happened between?

- Unique – requested a month transition – touched base with new boss once a week to ramp up to new job
- New manager – spoke with him several times in the timeframe
- Yes, had contact
- Yes, had contact – was in England, then lost touch, then employee reached out to recruiter to show he was interested – very good communication – shared what

Improvement Opportunities

What would you change to make it easier for you to orient to the company/your team?

- Recruiting process – once everyone was here, it was smooth –
- Create a group (5-8 EEs) to connect & share experiences
- Onboarding buddy to help EE through process
- Manager had checklist for several weeks – sites, people to meet, tour of the building,
- Couldn't get into building – had to request own access
- Who partner with for background checks – took one month or almost two months from offer to start date (was an overseas background check)
- Process took longer than anticipated – 6 months from recruiter reached out to his start date

What suggestions do you have for improving the onboarding process here?

- Our creative group, which is newly formed team, had a very limited onboarding experience. We relied on handwritten notes given to us by team of steps we need to do. There wasn't a welcome packet that outlines steps, how to setup technology, where to get key information or what/when to find benefit choices. We actually started to develop our own onboarding kit for new hires. Things you need to do and how. Several people outside of our team asked to see it if we complete it. We didn't finish or take it father because of work load and it was no longer a priority.
- I am on a creative director on the creative team and in previous agency life I have created welcome kits for several corporate clients in the past. Maybe something exists and possibly we were not supplied but if not I would highly recommend creating even if it is supplied in electronic version only.
- Food for thought but everyone struggled getting up to speed while starting.

  My supervisor and team is more focused on performance – sometimes focused only on process including the number of hours – feels like have flexibility to get things done and not do it in a bureaucratic way
- Quality over quantity
- Tutorial for using company website?

Appendix H – Focus Group Feedback from Hiring Managers

Onboarding questions for MANAGERS

Tools

What tools do you find most useful as a manager in onboarding new employees?

- EMPLOYEE NAME does all onboarding for the nurses
- Checklist created within the last year for them – useful – developed for use on a national level
- New Employee Checklist
- Reminder e-mails from recruitment –
- BLs are very useful, so the managers don't need to set up 1 person a year – helpful to have their expertise
- Established procedures within dept – standard procedures for managers – for new hires – started several years ago – will send 2 documents – purpose, roles, responsibilities, training, comprehensive document; includes all links to necessary documents or fill out
- In addition to BLs, the admin has also helped in additional training – that has been incredibly helpful; Give people tours of the building; module to complete the training modules – the required learnings – nice to have because help as time fillers
- EMPLOYEE NAME does all onboarding for the nurses
- Checklist created within the last year for them – useful – developed for use on a national level
- New Employee Checklist
- Reminder e-mails from recruitment
- Established procedures within dept – standard procedures for managers – for new hires – started several years ago – will send 2 documents – purpose, roles, responsibilities, training, comprehensive document; includes all links to necessary documents or fill out
- In addition to BLs, the admin has also helped in additional training – that has been incredibly helpful; Give people tours of the building; module to complete the training modules – the required Company learnings – nice to have because help as time fillers

Do you use the checklist and resources on website?

- Needs more training on process. The recruiters didn't help after the offer. The recruiters couldn't answer the questions.
- Needs more training on process.
- Moved the checklist into the one document – so don't use the separate checklist
- Did not use the checklist, not knowing where to look – could be a follow-up from the recruiter through an e-mail
- Don't know where to find it – easier to push it out or receive via e-mail
- Moved the checklist into the one document – so don't use the separate checklist
- Didn't use checklist, not knowing where to look – could be a follow-up from the recruiter through an e-mail
- Don't know where to find it – easier to push it out or receive via e-mail
- The recruiters didn't help after the offer. The recruiters couldn't answer the questions.
- Very little interaction with recruiter beyond hiring process
- Also little interaction
- have them go through components from enterprise HR and their team (Healthcare 101)
- Feels disjointed – pulls some from enterprise HR, some from ben ops, some from other e-mails. Feels disjointed to not have support or help from the recruiter
- have recruiters have insight into training, when it's being offered, etc. – national offerings – with facilitator – complex care, etc. – usually not offered more than once a month – that's why it's crucial to get the onboarding just right
- When disconnected, when going preceptor first

Does your recruiter help you with getting access to the right tools? If so, how?

- Very little interaction with recruiter beyond hiring process
- NO – the recruiter didn't help after the job offer – some recruiters are more helpful than others
- after the offer letter goes out, it stops there – may be an opportunity for a follow-up letter from recruitment
- NO – the recruiter didn't help after the job offer – some recruiters are more helpful than others
- After the offer letter goes out, it stops there – may be an opportunity for a follow-up letter from recruitment

What tools do you create yourself for onboarding?

- Employee journey map – new start-up for state healthplan – this is the list she uses – she is a new employee and hiring manager
- Nothing specific (in Mktg acquisition), which has been a struggle and the Mktg team is now working on something
- In past – tried to have access that the new person being onboarded would need – changes so quickly & frequently that it changes
- Nothing specific (in Mktg acquisition), which has been a struggle and the Mktg team is now working on something
- In past – tried to have access that the new person being onboarded would need – changes so quickly & frequently that it changes

Employee Focus

What questions do you most often hear from new employees?

- Who is my BL?
- Where to find things?
- How to use all the different resources?
- Intranet isn't intuitive search function – how to navigate the intranet and know if it's relevant
- Onboarding – new hires receive packet that explains training needed, state training, etc – definitely assist them to register for other courses.
- Where do I go for . . . ?
- Have collected the questions and compiled standard documentation and prepared answers, so have not received as many questions – receive info to be productive from day 1

When do you typically talk to new employees about

our company's business

our mission

our culture

- one of first things – attend sessions that cover everything the first week
- second week – get specific into role
- new employee orientation – within the first couple days – TX
- don't attend a culture workshop until they've been here a few months
- would like to see something covering COMPANY in more detail
- telesales – when done in mass, do it in day 1 – who is COMPANY
- values, culture in the first day – spend a lot of time with new employees to talk about that

Culture Focus

How would you describe our culture?

- strong sense of culture within division – not just something that we say, it's something that we live – and focus on doing it – base our work lives around – and person lives
- central – out of 25 years at other companies, this is the first company that across the divisions and people – feel that it's really practices and lives it – very happy with it
- Nicest organization I've ever worked for
- Suported – to everyone's interest that everyone succeeds – can call anybody and help you find answers
- Positive experience
- When talking with candidates – the values are buzz words – try to translate in a simple way – other
- Stuffy
- Better than previously – previously focused on stock price and bottom line – now there is more of a focus on the members and importance of relationships to service our members

Who do you hear/see talking about our culture and shared values (colleagues, manager, senior leaders, executives)?

- Central – from leadership
- Training course – employees don't get invited until after 6 months
- Full-day culture workshop and a reinforcement session – TX – culture trainings – enjoy and gives them a boost – gives you a sense of pride with the examples & the stories
- No longer sending them to the one-day training course and are now sending to them online
- Leaders, in department they are focused on culture a lot
- The company is really focused on culture and focused on the member – really trying to understand how impacting the member – like being here
- Great motivating experience – with telecommuters is even more important to interact with others – sometimes with travel restrictions need to do on-line

In your daily routine, what values to you see / not see being modeled? Can you share examples?

- Central – peer managers or leader of other depts. – doesn't matter where, they are always helpful. Screenshare – bend over backwards – never irritated – see them practice it all the time
- See from service coordinators – do their best to serve their members – care & compassion and looking to take care of the members – see it everyday in different forms
- Work with navigator program – above & beyond to be helpful for members – address barriers – assume positive intent – shift from negative to positive
- Takes a lot to change the stuffy culture – see many leaders who are applying the principles – getting a big lift by paying attention to these things and are making process – do it myself because see the impact of it when my leader does it

Where do you get most of your information about our shared values/culture?

- Link on website– how to integrate into meetings, different activities
- And some e-mails – monthly messages
- Managers – receive e-mails cultural values & how to share with your staff
- Culture training - attend along with direct reports sharing information
- Team meetings with leadership team
- Broader CEO calls always have culture embedded within meetings

Improvement Opportunities

What would you change to make it easier for you to orient new employees to the company/your team?

- OK time onboarding, but difficult time getting connected – telecommuters don't have codes, etc. – more closely integrate helpdesk or IT to get this fixed
- Barrier – ensure telecommuters have their equipment day 1 – need more tech support – came from another company that had one-stop shopping – always the same person to help them get connected
- Access – not be able to do things because don't have access
- IT group – provide contact information to help telecommuters – need a point of contact for help
- Overwhelming for people to receive boxes without support
- Can be very overwhelming for physicians – didn't do as much independently
- Explain what all the pieces are for – remote access, etc.

What suggestions do you have for improving the onboarding process here?

- Automated notifications – checklist items
- Links to items
- Manager resource
- New Employee Checklist & site – would be helpful to know that for managers & the new employee

Appendix I – Focus Group Feedback from Business Liaisons

Role & Tools

What is the role of a BL in onboarding new employees (e.g., IT/equipment, meet at front desk, tours, go-to for most things)

- find out from manager what is needed for the new employee – ensure get info from mgr that they received from Recruiting; start on the task list
- Stick to definition of the BL – requests information, depends on mgr to provide us with info needed to request new things – building access, software, computer
- New employee checklist – used to follow
- Managers expect a lot
- BLs don't do it all for manager – the mgr should connect with BL to discuss what the new employee needs, where sit, phone,
- Role as BL has reduced considerably because the manager does a lot more and the new employee does more
- does more to act as a liaison for managers and takes it further – how to get into company website, how to use phone, how to use app store; when gets task-oriented stuff done, then when arrive BL does a meet & greet, badge, building tour, lay of land – paper, eat at trash, service centers, keys, ergonomic features; provide white glove service
- Depends on admin support – expected to stay at desk to answer phones
- Checklist – for BL; also created a checklist for new hires, put in a binder; how to map drives; manager usually picks an onboarding mentor
- Checklist – an advocate created a checklist
- Check for the COMPANY NAME BL site

Do you direct employees to use the new employee checklist on the website?

- No
- No – but there is a link to that checklist

Do you help ensure they attend the new employee orientation session via WebEx?

- NO - Mgr or team member drives attendance at the new EE orientation

What questions do new employees typically ask you before they attend orientation?

- Not too many questions
- Within department, leveraged others to help onboard
- BL page – would be good for future
- One of the biggest parts of the processes – Real Estate – some people are showing up and there is a huge communication gap between real estate and the BSLs
- IT and HelpDesk and BLs – disconnect because HelpDesk is telling them to go to the BL – big issue for the new employees – causes frustration for the new employee to have to go back to the BL
- contact for BSL team lead – and just in time

What questions do they have after the orientation?

- Nothing
- Checks in again to make sure they're settled in

Company/Business Focus

What questions did you most frequently get from new employees during their first 30, 60 90 days in a new role?

- NONE
- Figure that a lot is done during the company interview
- Adding a culture element to the BLs would be too much strain
- Get some information if use the new employee checklist

Culture Focus

How do you describe our culture to new employees, friends, family, etc.?

- A lot of opportunity – many different opportunities that people can take part in
- Care about their employees – family friendly – do things for employees
- A lot of volunteer work
- See the volunteerism at COMPANY NAME – all care about each other – not just words like it was before at Company Name

Who do you hear/see talking about our culture and shared values (colleagues, manager, senior leaders, executives)?

- Depends on areas if gone through culture training – if not, sometimes go through culture shock – not used to SR fundraisers, etc. – culture is everyday living – lived it before and continue to live it
- Facilitators
- See it in action at lunch – people are living
- Boss – he really believes this and it's his way of life – incorporates it into everything
- Culture committee – have an off-site one day a year – incorporate SR activity on-site
- Culture Ambassadors
- Admins told that they don't go through the training
- Company site has information that can be shared
- At company name, had a culture fair – pulled people off the phones – day-long, went from one room to another and set up, so got immersed that way – everybody could go through it – dependent on business unit

Where do you get most of your information about our shared values/culture?

- Company website
- Ask your manager or find a director
- Company training site – there are a series of brief educational opportunities

How would you compare or contrast the culture here to the culture of the company you were part of before joining COMPANY NAME?

- Company name – entire career – no comparison opportunity
- Participated in a lot of culture training when at Company name – stress the employees for their hard work – they're concerned about your chair, environment, etc. (so similar in that they focused on the employee)
- Company name – focused only on benefits – catalysts – slaves – with COMPANY you're empowered to do it yourself
- Biggest difference for BL – number of steps and responsibilities a BL has for a new hire – have trouble getting everything pulled together – difficult to understand all systems and there's disconnects all over the place – frustrating – massive lack of respect for the role – constantly dealing with the complainers
- Have to fill out a lot of forms here in comparison to other companies – too many screens and other forms
- Ratio 1:50 supposedly, but is closer to 1:150-300 or 1:1000
- Instead of team focused, could help other BLs due to access
- Don't have to be an admin to be a BL

Improvement Opportunities

What would you change to make it easier for you to onboard employees to the company/your team?

- Included from beginning of process (once make offer, should be included right away)
- Communication
- Smoother Process – every request is separate – how to "bundle" in one place, rather than in different locations
- Consistency – closing communication gap – more inclusion in the process

Appendix J – Implementation Communications:

The Culture Action Research Team is a group of employees from COMPANY NAME that has identified opportunities to further our organizational culture transformation. We are excited to implement one of these opportunities to deliver an improved new employee experience for COMPANY NAME employees called THEME NAME. The team developed a three-phase action plan based on research done through focus groups, survey feedback, internal and external best practices, and senior leadership input:

- Phase 1 – focused on communications with the new employee and the hiring manager;
- Phase 2 – focused on company information and advice provided in a video format; and
- Phase 3 – focused on the new employees' involvement to welcome future new employees.

The team will implement Phase 1 starting this week for US-based employees. The major components (see attached communications) of this phase include:

- Communications to the hiring manager approximately 7 – 10 days in advance of new employee start date;
- Communications to the new employee on Day 1 from senior leadership to provide a warm welcome and links to relevant company information;
- Communications to SG29+ to provide an invitation to senior leader onboarding and culture information; and
- Communications to new employees from the "Welcome Crew" composed of more than 700 COMPANY NAME culture champions and leaders to welcome new employees to our organization.

Going forward, the team will evaluate the process through on-going feedback from new employees and managers. We will modify and update the communications/materials as needed. Based on the feedback, we intend to also create a process for Corporate Employees in the future. In addition we will begin developing videos (Phase 2) to present company information and advice from new and seasoned employees.

This project leveraged the strengths and input by many employees across COMPANY NAME; many thanks to:

- **Culture Action Research Team** - XXXXXX
- **Project Sponsorship** – XXXXXX
- **Creative Materials, Communications Development, and Distribution** – XXX

Please contact me if you have any questions.

Thanks,

Jane Kuhn

Appendix K – Welcome Crew Volunteer Request Communications

From: Kuhn, Jane M
To: Culture Champions
Subject: Help give our COMPANY NAME new employees a warm welcome!

The first few days – or months – being a new employee at COMPANY NAME can be a bit overwhelming. ***You can help***!

Work is well underway to improve the COMPANY NAME new employee experience and one component is the launch of a “friendly welcome” program from current COMPANY NAME employees. This program will:

- let new employees know that we’re happy they’ve joined COMPANY NAME
- provide another resource to help new employees get to know the company and our business
- bring our culture values to life earlier in the new employee experience process

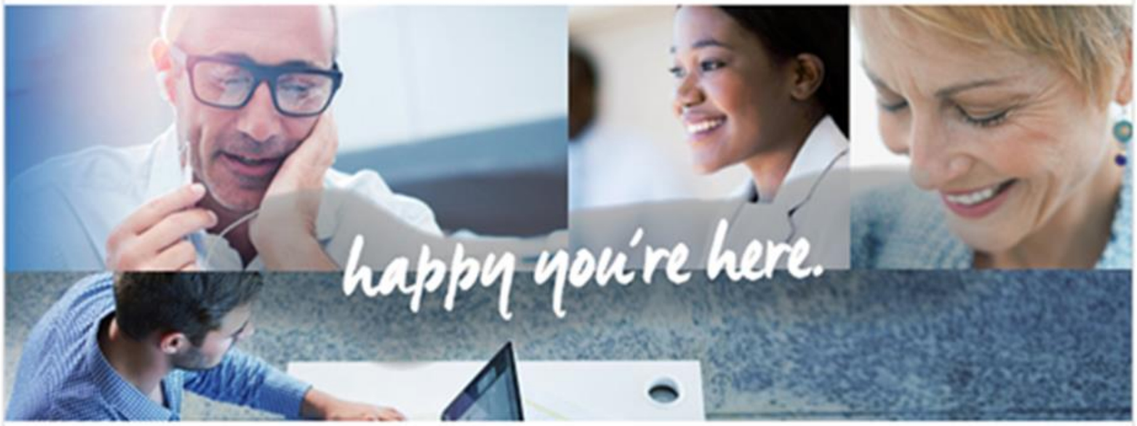
The time commitment from you is small. As a COMPANY NAME Culture Champion, you’d be asked to contact fewer than five new employees each month. You could send emails, make phone calls or meet in person with “local” employees. We’ll even give you ideas for discussion and written communication templates to make it easy.

My hope is that many of you volunteer for this and that we’re able to make a positive and lasting impact on the people who choose COMPANY NAME. Plus, it’s a chance to extend your network across the organization!

If you’re interested in this opportunity, please **VOTE using the voting buttons in the header** and let me know by **May 5**, as we’re planning to launch the updated program in Q3. Volunteers will receive more information regarding the updated COMPANY NAME new employee experience and “friendly welcome” program.

Thanks,
Jane

Appendix L – Communications to New Employees



Welcome.

We're happy you're here. You'll be an invaluable part of our team as we work together to achieve our mission: helping people live healthier lives. We do this by remaining true to our commitments – delivering better health, better cost control and a better health care experience.

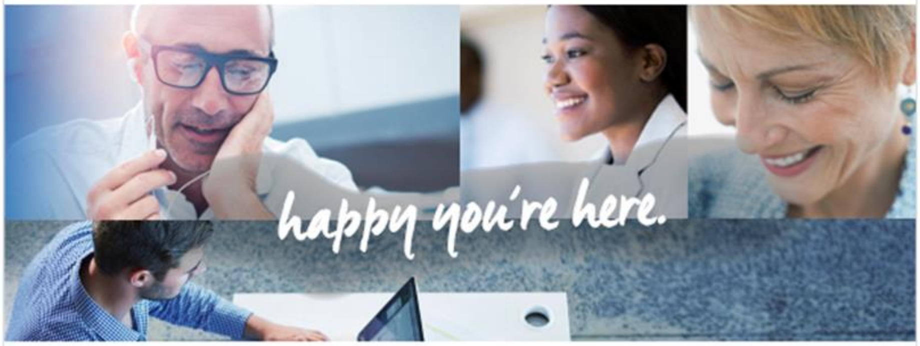
Equally as important to what we do is how we do it. That's why we've built Our Culture on shared values of and these as our guide, we're working to help build a better health care experience for each and every member.

One of the ways we remain true to our values is by making meaningful contributions to the communities where we live and work. **Get a glimpse** of how our time, talent and resources are helping the communities that inspire us.

We're looking forward to sharing more about our mission, culture and the work we do at Company Name In the meantime, take a few minutes to explore "Office Blog," a blog with the latest news from the CEO.

You can also find out more by visiting the "About Us" section on page.

Appendix M – Communications to Hiring Managers



Welcomed. It's how we want new employees to feel.

That's why we do the following key things – and ask for your help with the checklist as a hiring manager – to successfully bring each new employee on board.

Your manager checklist

Help support your new employee's experience by doing the following.

Before day one.

- [ ] Visit Orient New Employees in the **Manager Center** on site and complete all onboarding steps.
- [ ] Deliver a **personal welcome message** (e.g., handwritten note, phone call, email to a personal email address) to the new employee and provide details about his or her first day.
- [ ] Set up meet-and-greets for the new employee with team members, business partners or others.
- [ ] Develop a schedule for training and onboarding activities.

On day one and beyond.

- [ ] Greet your new employee upon arrival. (If a telecommuter, set up a phone call).
- [ ] Connect your new employee with his or her "buddy."
- [ ] Introduce your new employee to members of the team; consider hosting a lunch or coffee break or WebEx for telecommuters.
- [ ] Review the schedule and plan for the first week and what to expect during the first 30-90 days.

Download checklist PDF

Congratulations on your new hire.

Appendix N – Communications to Director and Above

Hello.

Welcome to Company Name

We're happy you're here. Your leadership skills and talents play a very important role in our mission of helping people live healthier lives. To kick off your onboarding experience, members of the senior leadership team have a **special leadership message** for you.

One of your responsibilities as a senior leader is protecting our company and those we serve. This **message** from our Chief Legal and Compliance Officers will guide you in the right direction.

As a new leader, you'll be participating in the Onboarding program. This program is just one piece of our onboarding process designed to help you gain the skills and knowledge needed for a successful start.

You'll receive notifications through Company Name **Learning Management System) for the following:**

Completing all of these learning opportunities during the first few months will help make your onboarding experience easier. It will also help you become a more effective leader and best position you to deliver a better experience to the millions we serve.

If you have any questions, please email Leadership Learning.

Appendix O – Mid-Project Reflection Communication Request

e-mail communication

To: CART Members

Subject: CART Reflection Questions

Thanks for your participation in the Culture Action Research Team. Part of the action research process is to reflect on the experience and your personal learning & development journey. This will be done twice – now and upon completion of the project evaluation. As a result, please answer the following questions and send your responses to me (please only send to me – do not reply to all). Thanks in advance for your willingness to share your thoughts. Please let me know what questions you have.

1. What is going well with the action research process?

2. What changes do you recommend for the action research process?

3. What have you learned to date through your participation in the action research process?

4. How will you apply your lessons learned in your current job?

5. How has participation impacted you on a personal or professional level?

Thanks,
Jane

Appendix P – Mid-Project Reflection Participant Feedback Responses

A. What is going well with the action research process?

- The ability to divide & conquer is nice. It is nice to actually research at the place where the changes will be implemented, versus reading research about things done elsewhere. I've really enjoyed the team you pulled together- what a great opportunity to get to know employees from across the company!

- The collaborative effort of this process is the best part of this project! Being able to have honest discussions about our areas of improvement has been very refreshing. We've then been able to put our heads together come up with actionable ideas that will bring real change in our culture. I'm very glad to have been a part of this team!

- Excellent Collaboration: The research team model was extremely effective & engaging

- We uncovered several opportunities to improve the onboarding experience and new places we could further embed our culture early in the new employee experience.

- We built a new team of colleagues who I believe will continue to engage with each other, collaborate and share best practices.

- We have a plan for short- and long-term actions.

- Frank & Direct Feedback: Transparent discussions on what works & what does not

- I am very impressed by Jane's leadership in identifying research owners. On previous projects, the number one obstacle was "who to contact and when". Jane never put out a call for action without identifying who the stakeholders should be and then manner in which they should be engaged.

B. What changes do you recommend for the action research process?

- The only change I would suggest is to broaden the scope in future rounds. I think it was very important that we didn't try to boil the ocean in this project, but I think in the future we can apply some of our best practices to our offices outside of headquarters.

- I really enjoyed the "research" part of the process – I'd recommend adding more time for broader research if possible.

- This isn't really a change – but the whole process has taken longer than I expected. I think this is just the reality of enacting change in a large organization, which has been a great learning experience for me. Clearer expectations on the front end to ensure understanding of requirements would have been helpful for me. I know there were times I was less engaged due to workload and personal matters.

- Unfortunately I can't provide insight on this question as I believe the program has continued to progress despite the staff's level of involvement. Jane has continued to understand when people needed to remain committed to their current roles, instead engaging them in other ways.

C. What have you learned to date through your participation in the action research process?

- I've learned that although we've come a long way with our culture, we still have a ways to go. In our discussions about the focus groups it was eye-opening to me the hear the impressions that new employees have of the company. After being here so long I had forgotten that new employees are coming from companies with culture that may be very different from ours and there are concepts that we can borrow to make our company a more welcoming and inviting place.

- Critical important of positive, vibrant, living culture in the workplace
- That we CAN change things if we have valid data, a logical approach and a team that has the desire and energy to make things happen.
- This has been a good reminder to ask questions and seek to understand. What I've thought or expected as outcomes isn't always the reality when talking with employees, experts, etc. I also learned that things I think are important may be less critical to others and vice versa. This process was a good reminder to be open to others' ideas.
- That team dynamics play a huge role in a the effectiveness of a project – need to have people who have time, who can manage tasks, who are self-aware.
- Frustrations & successes of new hires, managers, and existing employees
- Strategies of other companies who've created positive, nurturing work environments that in turn grew excellent employees & successful companies
- I've learned that the company is actually leaps and bounds ahead of their competitors. I walked into the action research team under the notion that we placed minimal weight on how we treat the candidate as the consumer. I have taken a 180 in my personal and professional opinion of the company.

D. How will you apply your lessons learned in your current job?

- I've already shared some of our items with my leadership team. They loved the concept of welcoming a new employee before the first day and going beyond the typical onboarding concept. Our department is now looking at even more ways we can reach out to that employee and touch them with our culture before they walk in the door.
- Onboard new hires using techniques discussed/learned via CART
- I am only 5 months into my current role, but the main thing I can apply is that the company continues to be a leader in the way it treats new employees. The level of commitment the company places on ensuring new employees are introduced to Our United Culture and the Employee Value Proposition amazes me. I am beyond thrilled to have learned this information and continue to share it with other employees in the organization.
- I will continue to drive change.
- Leverage collaborative model of CART for future projects, esp. team building
- I will build more effective short-tem, adjunct teams based on what I learned working with this team.
- My natural style and inclination is to do things by myself, independent of others. This has been a great reminder to me that collaboration is such a blessing and can truly lead to stronger ideas!
- Leverage Human Centered Design consistently when attaching problems

E. How has participation impacted you on a personal or professional level?

- Personally this has made me much more aware of the culture that I am reflecting. After being here so many years you tend to look at some items as gravity issues, that you really can and should challenge. In this project we've been able to look at things that could be more supportive to our culture and request that leadership to make those changes and that alone has really changed my perspective personally and professionally.

- Reinforced importance of compassion in all aspects of life

- I've grown my network even more and I've gained a little bit of courage and empowerment. This was a fun and rewarding experience.

- Embedding an effective, positive culture is critical…it's not just a "nice to have"

- I've really enjoyed the opportunity to get to know others across the enterprise and learn about something I wouldn't have had the opportunity to. As I mentioned above, this was a great reminder of how strong we can be when we collaborate and come together.

- Expanded knowledge of other areas of the company greatly as well as my peer network

- My participation in CART is the sole reason I decided to remain employed with the company. There was a moment in time when I planned an exit, but opted not to. As I looked back on the work we've completed, and the lessons I've learned, I was reminded (and wonderfully coached by Jane) that the company IS committed to living up to its core values of Integrity, Compassion, Relationships, Innovation, and Performance. I can't thank Jane enough for being both a personal and professional coach. I am blessed to have her in my life!

Appendix Q – Project-End Participant Feedback Reponses

What culture values or principles did we demonstrate as a team? Provide specific examples aligned with our values.

- Compassion: Team consistently took a human-centered design approached, and examined the new employee experience from the end-user (i.e. employee's) perspective as we designed a solution. Also gave high attention to hiring managers as well to ensure the solution was workable for them.

- Relationships – This opportunity allowed me to meet and form relationships with employees in the company that I may not have otherwise had the opportunity to work with. Some of these relationships organically transitioned into more-likely working relationships – NAME moving in to HC and NAME working on HC Communications for COMPANY NAME which often overlaps with other groups during core processes, etc.

- Innovation - The process was a great reminder to move outside of your close circle when forming project teams as others with more diverse perspectives may bring even better ideas. I felt uncomfortable when originally on the real estate redesign project team as I felt I was out of my zone and overstepping in to someone else's. At the end of the day, it felt like we all had the best interests of the company at heart and were able to move toward the best and most innovative solutions. Using our outside perspectives allowed us not to be blinded by the "rules" or "way things have always been done".

- Relationships: Team was highly collaborative in way we generated solutions, and overall approached the work of CART. Ideas were consistently discussed in a team environment where opinions were welcomed. In end, quality and new perspective emerged as the CART project evolved. End product much better as a result. We consistently leveraged the strengths of the team, particularly when you assigned work, Jane. Overall this demonstrated the power of relationships

- I believe we exhibited all five of our cultural values as a team to some extent, but the display of the Relationship and Compassion values really stood out to me. We made a point to work collaboratively and leverage the skill sets and connections of the each team member. Whether it was leveraging NAME's amazing PM skills or my connections at COMPANY NAME to understand their onboarding practices, we took the time to understand what we all brought to the team and made a great collaborative effort. Our display of compassion was also very impressive to me as well! We took to heart the stories about poor onboarding experiences and really made an effort to make sure this initiative would avoid repeating those mistakes. We immediately put pieces of the initiative into play with our own teams to improve that experience and got immediate positive feedback, those are the types of results that a compassionate effort brings forth!

- Integrity – we stuck to our commitments and focused on what we agreed to accomplish as a team.

- Compassion – we truly did consider the needs of our employees in the work we did (put ourselves in the shoes of new employees, telecommuters, BSLs)

- Relationships – Our team knocked this one out of the park – we built new relationships and formed a close-knit team because of the work we did. These relationships will continue to grow.

- Innovation - we reinvented the new employee experience at COMPANY NAME after studying current practices

- Performance – our focus was on delivering a new/improved experience for employees that focused on deepening understanding of our culture and increasing the impact our culture can have on very early in the new employee experience

- Compassion: Just six short months after joining CART, I accepted a new role within Talent Acquisition. This resulted in my inability to participate fully in the CART meetings. At no point did the team or the leader pass judgment, instead understood that the learning curve of my transition required my full attention. I was, and remain, impressed with the team's ability to seek to understand.

- Innovation: With a minimal budget, the team had to be creative in the way we rolled out potential solutions. This team relied heavily on innovative ways to promote our Culture. Jane would often challenge our thinking in an effort to move objectives forward in a creative and timely manner.

How can you apply our culture values to other situations or projects?

- We can apply values in most every situation – at work and outside work. I usually start with Compassion to understand where people "are" and how to approach situations. The other apply throughout and we all benefit when we use the values as our foundation. They are the "how" in the work (the "what") that we do.

- I am reminded to always assume positive intentions before passing judgment. This group taught me that there is always another side of the story that needs to be understood. While driving work/projects forward, I continue to seek to understand my customer's needs while understanding that they are simply trying to do what is best for their business segments.

- This project was a great reminder that we should be applying the culture values to every single interaction we have. Even just paging through the resources helps me get centered back on the values and applying them in our work.

- My team is focused on both project work and customer support . Thus, every day work relies on maintaining positive relationships, demonstrating integrity by meeting timelines, and understanding different perspectives (compassion). In short, I leverage the company values always, and so does my team.

- I can certainly apply the values displayed with this team with other projects. I'm just a month into a new role and it's very important that I learn how I can build positive relationships with my new team members. I want to learn what their skill sets are, learn what motivates and drives them in their roles, because I know that will all result in a better performance as a team.

How can this process be used to assess problems and determine solutions?

- Action research is dynamic and seems to capitalize on incremental progress – we use information to take action along the way. This can be helpful in making progress even on complex projects.

- I liked the action research. It makes sense to me. You see a problem and need a solution – actually go out there to research it and figure it out. We spend a lot of our day-to-day sitting behind computer screens and trying slightly altered versions of things we have tried before that haven't worked. I love the idea of getting out of your comfort zone, utilizing a broad and diverse team and making innovative recommendations.

- Adopt customer-centric (human centered design) approach, and assessment will be more useful and solution much better.

- The innovative processes we used have inspired me to find and implement solutions beyond the norm. In projects past, I have almost always applied a Six Sigma approach. Because this process often caused delay and red tape, I have taken a more collaborative approach knowing that I have to be more agile in my approach. Jane never said "No" to an idea, instead collaborated with stakeholders to identify an alternate solution.

- I think this process can be applied to a variety of issues. I think it was very smart of us to not attempt to boil the ocean and really narrowing our scope to areas that we could apply an immediate impact. We compared our current process to what other corporations are doing, we examined the shortcomings and specified areas that we could have the most impact on. I know this is a process I can apply to projects that I am working on as it is always important to be specific in scope, research the topic, and then take action.

How can we do things differently in an action research process?

- I think this process was done really well, not sure if I would have done anything differently.
- We can be more nimble.
- No feedback on this question. I am just truly amazed at the work Jane was able to accomplish in such a short time.
- I liked the process. The only thing I felt could have been improved was the speed. It felt like we'd have big bursts of progress and then a lot of waiting/down time. However, this could be the nature of an organization of our size.

Have we taken the right course of action (i.e., new employee experience project)?

- Yes. This was an area where an immediate impact could be made relatively fast. Also, it was an area that was ripe with opportunity. Based on that, was the right course of action.
- I really think so! I am so thrilled to have been a part of the team that came up with the new employee experience project. It seems like a "quick win" for new employees and we were able to build upon the successes of internal best practices.
- Absolutely.
- I think we have, because new employees are the easiest audience to make a substantial impact on. Existing employees will be a bit more difficult to tackle considering you have to overcome preconceived notions, experiences and opinions. We will eventually get to that audience, but I think leading with the new employee experience makes sense.
- Yes. Rather than creating something from scratch, the team relied on previously created processes and best practices within the organization and tailored them to be beneficial for COMPANY NAME.

What will you do differently as a result of participating in action research?

- I will make more of conscious effort to make sure the projects I'm on have a culture aspect to remind people that culture is something we live and breathe and not a concept that sits on the shelf. I will also hold myself to be more accountable to stepping up and looking for ways to make proactive changes, instead of just complaining about the situation.
- I will consider "how big is your team" as a result of this experience – I'll bring together people I don't know more often. This will allow me to learn and develop in new ways.
- I will try to push myself to think outside of the box more, and include people that may have different perspectives than my own.
- I will be more actively involved in the onboarding of new staff as a culture buddy. Though my time has been limited over the last 8 months, I am excited to delve back into Our United Culture, place it front and center – Living our values in my everyday work rather than just talking about it.

How will you transfer your learning from this process to future projects or initiatives?

- I love the idea of getting out of your comfort zone, utilizing a broad and diverse team and making innovative recommendations.

- I've been sharing my CART experience with my team as an example of successful collaboration, as well as driving progressive improvement. My team has benefited from my experience, and allowed them to reflect on how they could approach their daily work differently to produce a more positive outcome.

- I plan to do more research on Action Research to apply in the future.

- I will take what I learned about working collaboratively and compassionately and apply it to future projects. As I learn what my new teammates strengths are I will leverage those strengths for a better performing project/initiative. At the end of the day the product or initiative I am working is touching a customer and I will need to be compassionate to their concerns.

- I've been talking about the work and also about the team dynamics/skill building/relationship opportunities with my team.

How can you share your learning from this process and project with others for organizational learning?

- Yes, and I already have and will continue to do so! I shared the email template and the handwritten note with my hiring managers and they immediately put it into practice with our onboarding practices. I'll definitely continue to share with any hiring managers and teams that can benefit.

- I think the way I will share my learning is through my changed behavior and approach to projects. Helping others to see the value in a process like this, utilizing diverse team and not staying locked in by what we have always done.

Appendix R– Learning Types

Comparison of the Different Learning Types

Learning Types	Theoretical Assumptions	Reflective Questions
Action learning	Concerned about learning from experience and reflection, with focus on group discussion, trial and error, and individual learning (Marquardt, Leonard, Freedman, & Hill, 2009; O'Neil & Marsick, 2007; Pedler, 1996; Revans, 1980; Zuber-Skerritt, 2002)	"How can we do things differently in this situation?" What can we learn from our mistakes?" "Have we taken on the right course of action?"
Cognitive learning	Concerned about knowledge structures, belief systems and operational strategies, with the focus on individual interaction of mental modes (Argyris & Schön, 1996; Fox, 1997; S. K. Gibson, 2004; Senge, 2006)	"What do we think of ourselves and others in complex situations?" "How can we respond to changes in organizational systems, structures, and strategies?"
Behavioral learning	Concerned about repeating behavioral patterns that are tried and testing (Cyert & March, 1983), with the focus on reducing errors (Bateson, 1971)	"How do we react to uncertainty and unfamiliar problems?" "How can we reduce making the same mistakes or potential mistakes?"
Experiential learning	Concerned about the process of knowledge creation through the transformation of experience, with the focus on adaptation to the world (Holmqvist, 2004; Kolb, 1984; Vince, 1998)	"What experience can we get out of doing this?" "Can we be better learners and problem solvers the next time?"
Organizational learning	Concerned about organization's capacity to bring them closer to their targets, with the focus on improving organizational life (Argyris & Cchon, 1996; Edmondson & Moingeon, 1998; Senge, 2006)	"How can we get people to learn continuously both individually and collectively?" "What can be done as an intervention to improve learning in the organization?"
Problem-based learning	Concerned about solving complex issues, with the focus on learning collaboratively to find and evaluate sources learners need (Barrell, 1998; Enger et al., 2002; Raelin, 2008; Savin-Baden, 2003)	"What are the underlying problem issues?" "How do we perceive these problems and then provide effective ways of solving them?"

(Sofo, Yeo, Villafane, 2010, p. 208-209)

Appendix S– Example of Personalized Communication to New Employee

4/11/16

Kim -

I'm thrilled you are going to be joining Company Name and the Fraud Prevention Team! The addition of your talent, experience and commitment will help us to achieve our team mission: TO Connect & Enhance anti-fraud capabilities across the organization in order to detect, deter, and prevent fraudulent behavior.

We are looking forward to your arrival on Monday, April 18. If you have any questions, please let me know.