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Dialogue and Roles in a Strategy Workshop: Discovering Patterns through Discourse Analysis

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Discovering Patterns

through

Discourse Analysis

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MSc in Strategic Management DT 346

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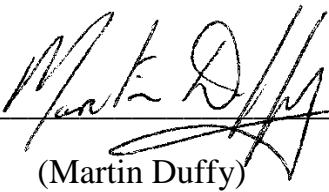
Declaration

I hereby certify that this material, which I now submit for assessment on the programme of study leading to the award of MSc in Strategic Management is entirely my own work and has not been submitted for assessment for any academic purpose other than in partial fulfilment for that stated above.

Signed _____
(Martin Duffy)

Date   01st October 2010

Acknowledgements

Dedication

To the cherished memory of my late mother, Maura Duffy. Your love of reading, learning and a broad perspective on life continue to guide.

To the continued longevity of my father, Paddy Duffy. Never failing to strike a plan, your work ethic and embrace of personal challenges fostered the perseverance to always see a job to completion.

Go n'éirí bhur mbóthar libh le chéile, le cúnamh Dé.

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Abstract

Strategy workshops are frequently used by Executive management teams to discuss and formulate strategy but are under-researched and under-reported in the academic literature. This study uses Discourse Analysis to discover participant roles and dialogic patterns in an Executive management team's strategy workshop, together with their effect on the workshop's operation and outcome. The study shows how the workshop participants adopt different roles through their language and content. It then identifies a dialogic pattern in the workshop discourse, with the emphasis on achieving shared understanding rather than winning the debate. The workshop facilitator's role is shown to bring discussion as a counter balance to the group's dialogue, focusing the evolving dialogic discourse on actionable outcomes. The study goes on to show how these two discourse features combine to enable a comprehensive exploration of a strategic topic in a limited time frame and to build a consensus based strategy to be followed. The group's use of metaphor and the construction of organisation and individual identities were also examined. They were shown to have limited impact on the developing roles, dialogic discourse or workshop's outcome. Overall, the analysis shows how the combination of roles and dialogue surface implicit meaning from the group's discourse and enable a significant shift in the groups thinking, charting the way for a fresh perspective on an acknowledged long-standing, strategic problem.

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CHAPTER 1

INTRODUCTION AND OVERVIEW

1 INTRODUCTION AND OVERVIEW

1.1 NATURE OF THE RESEARCH AND METHODOLOGY

1.1.1 Introduction

In September 2008, an inadequately forecast recession required a rapid strategic response from many organisations. The absence of contingency provisions in existing strategic plans compounded the strategic problems in some Higher Education (HE) organisations in Ireland (ESTIP, 2008). Curiosity about how they would create strategy to guide them out of the crisis was the initial impetus for this research.

The research answers the following question:

> How do discursive interactions in a facilitated strategy workshop define and refine a strategy problem and associated response?

Mintzberg suggested that strategy could be crafted in the same way a potter moulds pieces on the potter's wheel, adding that 'Managers are craftsmen and strategy is their clay (Mintzberg 1987, p.66). This research is analogous to a visit to a potter's studio, to examine how an executive management team formulates strategy in a workshop setting.

The study uses Discourse Analysis (DA), as both methodology and method (Phillips & Hardy, 2002), to identify how the team constructs their perception of and response to a significant strategic problem through their discourse.

This Chapter initially provides an over-view of the context and nature of the research, followed by an academic and practitioner rationale. It introduces the literature informing the study and then briefly outlines the industry context in which it was carried out.

1.1.2 The Operational Context

Strategy workshops have a low incidence of study in the academic literature (Johnson, Prashantham and Floyd 2005; Jarzabkowski 2002; Hodgkinson et al 2006, p. 480; Hendry & Seidl 2003).

Previous work as a planning consultant afforded me access to executive management teams, to record their 'naturally occurring texts' (Phillips and Hardy, 2002, p.70) in a strategy workshop setting. Two normal strategy workshops were conducted and the proceedings were recorded for later academic research.

It should be noted at the outset that I had two roles in the research process – researcher and the workshop facilitator. In this case, Hardy's concept of reflexivity, 'how the process of doing research shapes its outcomes' (2001, p.32), required careful attention to a balanced review of my personal influence on the group's discourse and my subsequent analysis of that discourse.

1.1.3 The Research Question.

The Research Question (RQ) was developed iteratively as the study progressed, working from a broad research topic, through a research idea and culminating in the following RQ (Hogan et al 2009, p.1; Creswell 2009, p.129; Phillips and Hardy 2002, p.62);

> How do discursive interactions in a facilitated strategy workshop define and refine a strategy problem and associated response?

1.1.4 Research Objectives.

The research objectives for the study are:

- To examine how participant's construction of roles informs the progress and outcome of their workshop.
- To examine how dialogue (versus discussion) helped the participants to build a consensus based understanding of and response to the strategic problem they faced.
- To examine the impact of metaphor in the workshop discourse.
- To examine how the participants defined identities through their discourse.

The analysis of how these discourse features manifested themselves is presented in detail in Chapter 4 and Appendix G and H.

1.1.5 Unit of Analysis.

The Unit of Analysis is a single, executive management team's strategy workshop (Jarzabkowski & Seidl 2008, pp 1399; Whittington et al 2006).

1.1.6 Research Methodology and Methods.

Discourse Analysis (DA) was adopted as both methodology and method for this study (Phillips and Hardy 2002). They suggest that 'naturally occurring texts' (ibid, p.70) are a better source of data for DA, because they provide actual examples of language in use and represent a firsthand account of discourse that informs the development of an organisation.

DA was used to examine different features of the group's discursive interactions in the workshop, to identify how those interactions helped to construct their understanding of the strategic problem and to initiate a strategic response.

Chapter 2 reviews the relevant methodology literature informing this study. Chapter 3 provides a detailed description of how the workshops were organised and managed, along with a detailed description of how the data was analysed.

1.2   RELEVANCE OF THIS RESEARCH.

1.2.1 The Academic Research Context.

The gap between theoretical strategy literature and the actual practices of people involved in strategy processes prompted a range of 'practice' literature focusing on how strategy was developed (Jarzabkowski 2002). Strategy-as-Practice is broadly aimed at studying the 'practice that constitutes strategy process' (Jarzabkowski and Spee 2009, p.70).

Strategy workshops are an acknowledged part of strategy development processes in many organisations. They are used to review, formulate or plan strategy (Schwartz 2004a) but are rarely triggered by external pressures or crises' (Hodgkinson et al 2006, p.482).

In this study, a strategy workshop was arranged to develop a strategy to respond to a recessionary crisis.

A number of studies support DA as an appropriate methodology for studying strategy and strategy formation (Knights and Morgan 1991; Hardy and Palmer 1999; Hendry 2000). Thomas, Hardy and Sargent (2007) is one of the few examples of a study using DA to study strategy workshops.

The academic literature highlights a need for more empirical studies of strategy workshops. A personal background in planning consultancy provided access to a number of Executive management teams as they considered strategies to deal with a severe recession.

In this study, opportunity meets need, and DA provides an 'interpretive lens' (Barry & Elmes 1997, p.430) to analyse how an executive team's discourse constructs strategy, in the context of a single strategy workshop.

1.2.2   A Practitioner's Perspective.

Strategy workshops are often organised on a formulaic basis, with predetermined agenda, exclusive attendees and a proforma structure (Johnson, Prashantham and Floyd 2005; Hodgkinson et al 2006).

Workshop facilitators often use facilitation techniques based on what Schein calls 'sensitivity training' (1993, p.30). The focus is on smoothing relations between participants, promoting active listening, ensuring equal participation time and building a consensus based output. This approach can be mechanistic, with little or no attention paid to how the participant's discourse constructs their workshop outputs.

This study provided an opportunity to review the operation of strategy workshops from a different perspective. Reviewing the theoretical basis of strategy workshops, along with an analysis of a group's discourse, provides a new perspective on two features of workshops; a dialogic (as opposed to discussion based) pattern of exchange within the group (Senge 2006) and a form of role play by participants that evolved from a combination of the content and form of their conversation.

1.3   LITERATURE INFORMING THIS STUDY

Two main bodies of literature inform this study; strategy literature, (particularly strategy-as-practice) and DA literature.

The former grounds the study from an ontological perspective, providing an academic heredity for the strategy workshop.   The latter informs an epistemological perspective, in terms of the methodology and methods used.

Subsidiary literature relating to the dialogic form of the group's discourse was also reviewed, as a basis for analysing this feature of the workshop discourse.

Chapter 2 reviews three literature streams relevant to this study: Strategy and Strategy-as-Practice, Discourse Analysis and Dialogue literatures.

1.4   HIGHER EDUCATION SECTOR IN IRELAND

This study is set in the Higher Education (HE) sector in Ireland. As a binary system, it comprises mainly Universities (7) and Institutes of Technology (13), with a small number of private third level colleges (OECD 2004, pp9). The most relevant recommendation in the OECD review (pp32/33) was the need for additional support for improving adult education provision.

Between 2004 and the onset of the recession in 2008, little was done to implement the OECD recommendations. In particular, the problems associated with adult education were still present and exacerbated by the onset of the recession.

Against this industry context, adult education was selected by one HE organisation as the topic for their workshop in this research.

Chapter 4 expands the industry context and background for the study. It also details the selection of sites for the research. For confidentiality reasons, only limited details about the subject organisation can be provided.

1.5   CONCLUSION

This chapter provided an overview of the study. It introduced the research question, its objectives and the context from which they were derived. It outlined the rationale for the study from an academic and practitioner perspective and highlighted the academic literature that guided the research. It finished with an overview of the Irish Higher Education context and why the workshop topic, adult education, was of strategic significance.

CHAPTER 2

LITERATURE INFORMING WORKSHOP RESEARCH

2 LITERATURE INFORMING WORKSHOP RESEARCH

2.1 INTRODUCTION

The literature reviewed in this chapter provides a basis to answer the research question:

> How do discursive interactions in a facilitated strategy workshop define and refine a strategy problem and associated response?

Two principal bodies of academic literature underpin this dissertation;

- Strategy development literature particularly focused on Strategy-as-Practice (S-as-P).
- DA literature, mainly as it relates to strategy formation and development.

A subsidiary body of literature on dialogue was also examined due to the dialogic (as opposed to discussion based) pattern of the group's discourse (Senge 2004).

The chapter begins by briefly tracing the history of strategy thinking, how Mintzberg (1987; 1994) brought about a mindset shift with the concept of 'emergent' strategy and how the Strategy-as-Practice literature evolved. In this context, literature on workshops as a specific S-as-P phenomenon is reviewed.

DA literature is reviewed from both a methodology and methods perspective (Phillips and Hardy, 2002) to show how it informs the overall strategy process and how it also relates to the specific analysis of the text generated from the strategy workshop.

Dialogue literature is finally examined to develop dialogic indicators to support a more refined analysis of dialogue in the workshop proceedings.

2.2   FROM RATIONALIST TOWARDS CONSTRUCTIONIST STRATEGY

There is no universally agreed definition of strategy. Early strategy literature viewed strategy and its development as an activity and outcome driven by structured process. Early 'rational models' of strategy were based on an assumption that strategy decision making could review all available options, map the pros and cons of each option and select a 'best option' based on a specific desired outcome (Hart 1992). Porter (1996) identified the need for a company to 'establish a difference that it can preserve' as a corner stone of good strategy. Factors such as operational effectiveness, unique selling points for products or services, sustainable market-place positions and seamless integration of all operational activities were all considered essential components.

'Rational planning models' (Hart 1992) were developed by researchers such as Porter (Porter's five forces), Ansoff (Ansoff's grid) or the Boston Research Group (Boston matrix) on the premise that strategy could be best developed through structured processes and logical thinking.

These approaches for developing strategy were broadly based on evaluation of the market place, assessment of external competitive forces, review of internal strengths and weaknesses and development of carefully structured plans to formulate and implement strategy (Hart 1992).

TABLE 2
An Integrative Framework for Strategy-Making Processes

Descriptors	Command	Symbolic	Rational	Transactive	Generative
Style	(Imperial) Strategy driven by leader or small top team	(Cultural) Strategy driven by mission and a vision of the future	(Analytical) Strategy driven by formal structure and planning systems	(Procedural) Strategy driven by internal process and mutual adjustment	(Organic) Strategy driven by organizational actors' initiative
Role of Top Management	(Commander) Provide direction	(Coach) Motivate and inspire	(Boss) Evaluate and control	(Facilitator) Empower and enable	(Sponsor) Endorse and support
Role of Organizational Members	(Soldier) Obey orders	(Player) Respond to challenge	(Subordinate) Follow the system	(Participant) Learn and improve	(Entrepreneur) Experiment and take risks

Source: Hart (1992, p334)

Figure 1 – Hart's Integrative Framework

Through synthesising a wide range of strategy formation typologies, Hart (1992) developed a five mode, integrative framework reflecting the roles played by managers and staff in strategy making processes (see Figure 1 above).

Synthesising past typologies of strategy formation, Mintzberg and Lampell (1999) identified 'ten schools of strategy formation'. They also looked at new approaches for developing strategy which spanned a number of their 'schools' (see Figure 2).

Table 2
Blending of the Strategy Formation Schools

Approach	Schools
Dynamic capabilities	Design, Learning
Resource-based theory	Cultural, Learning
Soft techniques (e.g., scenario analysis and stakeholder analysis)	Planning, Learning or Power
Constructionism	Cognitive, Cultural
Chaos and evolutionary theory	Learning, Environmental
Institutional theory	Environmental, Power or Cognitive
Intrapreneurship (venturing)	Environmental, Entrepreneurial
Revolutionary change	Configuration, Entrepreneurial
Negotiated strategy	Power, Positioning
Strategic maneuvering	Positioning, Power

Source: Mintzberg and Lampell (1999, p.26)

Figure 2 – Mintzberg's Blending approaches for Strategy Schools

Dynamic capabilities, Resource-based theory and Constructionism from Figure 2 above are particularly worth noting. They provide an evolutionary bridge from the preceding rationalist approach, to an emphasis on management and staff's influence portrayed in the Strategy-as-Practice literature and the social constructivist epistemology that largely informs DA (Phillips and Hardy 2002, p.5)

2.3 CHANGED THINKING ON STRATEGY DEVELOPMENT

The orthodoxy of 'rational' strategy development was grounded in a rigorous approach to strategic planning (Knights and Morgan 1991). As a scientific management approach, many companies invested heavily in strategic planning. It came to be perceived by some as the essence of strategy, a view which Mintzberg (1994) and Hamel (1996) found to be flawed.

Mintzberg separated the concept of 'strategy making' or 'strategic thinking', from 'strategic planning'. He saw strategy making as synthesising the inherent intuition, experience and creativity within the whole organisation, into a coherent vision for the future Mintzberg (1994). In this context, strategic planning was then viewed as an analytical exercise focused on preparing the strategic plan (or road map) to deliver the future strategic vision.

A related view of strategy saw it as something that emerges from the ongoing discourses within an organisation (Knights and Morgan 1991). Their proposal positioned strategy discourse as 'the topic of analysis rather than as a resource'. They saw strategy as something that emerged from ongoing discourse and was therefore 'always in a state of flux or in a continuous process of reconstitution'. Viewed in this light, DA offered a viable method for studying strategy.

Mintzberg (1987) developed the concept of crafting strategy, which he called 'emergent strategy'. Viewing an organisation as analogous to a craftswoman forming pottery, he saw 'Strategies as both plans for the future and patterns from the past' (ibid, p.67). In the same way that potters use tacit knowledge, skills and experience to inform their future creative work, Mintzberg proposed that organisations should employ the tacit knowledge and experience of the whole organisation to inform future strategy development.

Such strategies may be a continuation of patterns from the past or alternatively could be 'deliberate', in that they were chosen to 'realize the specific intentions of senior management' (Mintzberg 1994, p.111).

Mintzberg described 'Umbrella strategies' as a combination of 'deliberate' processes for strategy formation being set down by senior management, but with the 'emergent' strategy being informed by the whole organisation (ibid. p.71).

Knights and Morgan suggested that 'a genealogical and discourse analysis can stimulate a more critical study of organizations' (1991, p.271), in order to better understand how such strategies are formed. This new thinking about the meaning and development of strategy lead to the evolution of Strategy-as-Practice literature as a means of studying and recording strategy practices.

2.4   STRATEGY-AS-PRACTICE AND STRATEGY WORKSHOPS

2.4.1 Strategy as practice

'There is a curious absence of human actors and their actions in most strategy theories' (Jarzabkowski and Spee 2009). In a review of Strategy-as-Practice literature (S-as-P), they suggest that strategy research practices have taken little account of how human actor's 'emotions, motivations and actions shape strategy'. Combined with 'the economic-based dominance over strategy research', this provided the main impetus for the evolution of an S-as-P approach to strategy research.

Jarzabkowski and Spee (2009) also propose S-as-P as;

> 'a means of furthering the study of social complexity and causal ambiguity in the resource-based view, unpacking the dynamism in dynamic capabilities theory.....and explaining the practice that constitutes strategy process.....'.

It is worth noting that these three approaches were seen earlier in Figure 2, which Mintzberg and Lampell (1999) saw as 'blending' their ten schools of strategy formation. This shows that S-as-P does not try to replace previous strategy research methodology, but rather is complimentary to it, broadening and deepening an understanding of all the factors that go to make up strategy.

S-as-P research focuses on three principle areas:
- Practitioners - the actors involved in strategy making;
- Practices - the tools used to formulate strategy;
- Praxis - the flow of activity in which practices are deployed by practitioners to accomplish strategy
(Jarzabkowski and Spee 2009, p.70).

From their literature review, they developed a typology for S-as-P research, comprising nine types (see Figure 3 below).

They use practitioner types as one dimension and level of praxis as the other to define different types of S-as-P research.

Figure 3 – Jarzabkowski and Spee's Typology of S-as-P Research

The strategy workshop in this study may be categorised under two of the S-as-P research types - Type D and Type G.

It is located in the micro praxis of Types D and G, given its focus on how and what the participants were doing in the workshop. Viewed along the practitioner dimension for types D and G, the executive team members constitute aggregate actors within the organisation, while the workshop facilitator (and researcher) is an extra-organisational actor. The facilitator is considered an actor in this context since his workshop role is also subject to analysis in the study.

In describing Types D and G, Jarzabkowski and Spee (2009, pp.76-78) note that few studies have been done under either type. Thomas, Hardy and Sargent (2007) used DA to study a workshop as 'a secondary boundary object'. Their workshop involved mixed management grades developing a common understanding of a toolkit for culture change (primary boundary object) through their discourse.

In most cases, strategy workshops tend to be exclusive to the most senior managers (Hodgkinson et al 2006; Johnson, Prashantham and Floyd 2005).

They are often treated as a forum for individuals or groups to engage in power games to maximise their own influence on the strategy being formulated and have been described as 'high stakes activities' (Whittington et al 2006, p.619).

Of the workshop research reviewed, none has used a single homogenous management group in a workshop setting, as their topic of study or unit of analysis. This was instrumental in developing the unit of analysis and research question for this study.

Given the macro level of analysis in previous strategic management research, Balogun, Huff and Johnson (2003, p.198) saw a methodological challenge for S-as-P, due to 'The growing need for researchers to be close to the phenomena of study, to concentrate on context and detail, and simultaneously to be broad in their scope of study...'. They identified three data gathering approaches, interactive discussion groups, self-reports, and practitioner-led research, that could 'maximise the use of researcher time but still yield adequate, contextually grounded data' (ibid. p.200). They also identified five criteria for assessing these or other data gathering approaches.

Given the similarity between the facilitated strategy workshop in this study and their 'interactive discussion groups' and 'practitioner-led research', the five criteria were used to assess the efficacy of this study's strategy workshop for data gathering. The results are shown in Table 1 – Suitability Criteria for Data Gathering in Section 3.4.3.

2.4.2   Strategy workshops

For their apparent ubiquity, strategy workshops are an under-researched and poorly reported phenomenon. They are 'widely acknowledged to be important but have not previously been subjected to any detailed or systematic analysis' (Hendry and Seidl 2003). They are also 'a common and frequent, yet under-researched, organisational practice relating to strategy development' (Johnson, Prashantham and Floyd 2005).

Hodgkinson et al (2006, p.480) refer to the relative dearth of knowledge on strategy workshops, saying; 'In short, we know very little about a phenomenon

that, on the face of it, appears to be important in understanding the practice of making strategy'.

On the availability of empirical studies on strategy workshops Schwartz (2004b), (citing Blackler, 2000 and Mezias et al 2001) comments; 'Current literature provides only limited empirical accounts of what occurs during strategy workshops'.

The nature of strategy workshops. For many organisations, strategy workshops are routine events but there is a lack of research and analysis of these significant strategic events (Hendry and Seidl 2003). Citing Luhmann's theory (1995) on structured episodes, which views social systems as systems of communication and not systems of action, they conceive strategy workshops as one such episode. They suggest that strategy workshops are used by senior managers as a mechanism to switch from an operational focus to a strategic focus. Developing the idea of episode (or workshop) structure, they suggest that structure can be achieved through self-organising within the workshop itself. Their framework highlights three distinct phases: workshop set up, workshop conduct and workshop conclusion.

This study is particularly focused on the conduct aspect of a workshop and Hendry and Seidl's framework is used to draw conclusions in Chapter 5.

Extending the concept of structure and how it might shape a workshop's content and outcome, Jarzabkowski and Seidl (2008) identify four types of discussion which could occur in a workshop setting; free discussion, restricted free discussion, restricted discussion and administrative discussion. They suggest that the type of discussion is dependent on how the workshop was structured and that a combination of structure and discussion format will determine the impact of the workshop on the organisation's strategy.

A comparison is made in Chapter 5 between Jarzabkowski and Seidl's typology and the form of discussion observed in this study's workshop. Based on evidence from the workshop discourse, an assessment is made of the likely impact of the workshop on the organisations existing or future strategy.

Strategy workshops as boundary objects. Boundary objects are entities (activities, actions, objects) within organisations which can be used by different groups for different purposes. They also provide a forum for groups to come together to share common meaning or build consensus understanding. As such, they provide another way to view strategy workshops. Thomas, Hardy and Sargent (2007) suggest that boundary objects are ' "nested" phenomena wherein cooperation is achieved through the interplay of artefacts, interactions and organizational decision-making processes'. They highlight the potential for both positive and negative outcomes from workshops, specifically the possibility of being seen as 'talkfests', if not explicitly connected to larger organisational decision making processes (2007, p.26).

This concern was explicitly raised by participants in the workshop in this study and the issue was addressed within the workshop (see Chapters 4 and 5).

Structure and rituals in workshops. Strategy workshops are often infused with expected structures and rituals, differentiating them from routine operational activities and helping participants to get into a more strategic frame of mind. In contrast with Hendry and Seidl's (2003) focus on structures, Johnson, Prashantham and Floyd (2005) studied workshop rituals and their impact. On the challenge of bringing workshop content into the wider organisation, they considered the impact of rituals such as being off-site, using standardised tools and techniques, restricting attendance to senior managers and engagement with external consultants.

In this study, their work provides another useful dimension to analyse how one participant discursively deals with his concern about the relevance of the workshop's discourse to the wider organisation and also for a subjective comparison to assess the likely transfer of the workshop proceedings to the wider organisation (see Chapter 5).

Consultants in strategy workshops. Workshops could also be seen as a form of ritualised theatre (Barry and Elmes 1997, p.433: Wright, 2010). Arguing that consultants are strategists, since they are engaged to develop strategy in organisations, Wright (2010) points out that consultants' workshop preparation can critically influence their conduct and outcomes. On occasions, behaving like 'performers in front of an audience' consultants may pander to the known preferences of individual patrons, as instanced in Schwartz's (2004b):

> 'This was not an agreed agenda item, but before the workshop had begun, the CEO had asked the facilitator in confidence to introduce the topic "at a good time" '.

Such forms of collusion support Wrights proposition that consultants are strategists, as they take part in and strongly influence the strategy process and its outcomes.

Schwartz also records one consultant's concerns in an interview;

> ' "On the one hand I was furious about them spoiling the event… on the other hand I needed them to buy in to the workshop… I have to deliver something to the CEO by the end of the day … I don't want to lose this client." '.

This illustrates that consultant's can be selfishly motivated seeking re-engagement, as much as for developing their client's strategy.

Where external workshop facilitators are engaged, participants 'that have privileged access to the consultants outside of the workshop', may hold back views or opinions if offering them might disrupt the flow of the workshop (Wright 2010). In such cases, the consultants act as a bridge between the routine organisational activity and strategy workshops, thus taking their strategy making beyond the confines of the workshop itself.

Writing up the output from strategy workshops also significantly empowers consultants in the strategy process. These outputs represent a tangible record of proceedings and may be referenced in the future.

Wright and Schwartz's work provided a valuable reference for analysing the facilitator's involvement in this workshop.

General points of comparison. Hodgkinson et al's (2006) analysis of a major survey of managers' experience of strategy workshops also provides useful comparison data. By being facilitated, the workshop in this study differs from the norm, given the low incidence (16.5%) of facilitated workshops in their survey. Other features such as the nature of workshop outputs, low use of analytical approaches, homogenous participant groups and their temporal and spatial proximity to routine organisational activity, provide points for comparison and comment in Chapter 5.

A counter view on crafting strategy in workshops. Whittington et al's (2006) treatment of workshops is in part founded on Mintzberg's views on crafting strategy. Ascribing to Mintzberg 'that strategy as a whole should best be seen as ′crafted′ through emergent processes, with formal strategy analysis a distraction', their interpretation of Mintzberg's crafting strategy appears to be one-dimensional and somewhat at odds with his original proposition.

Mintzberg (1987, p.69) was of the view that 'In practice, of course, all strategy making walks on two feet, one deliberate the other emergent' and he adds 'Likewise, there is no such thing as a purely deliberate strategy or a purely emergent one'.

From an apparent misconception of 'crafting strategy', Whittington et al (2006) characterise certain workshop practices as examples of 'crafting':

> 'The series of workshops was carefully crafted in order to achieve consensus on change. The consultations were not designed to develop a superior solution, but to give the impression of agreement around one that had already been formulated.'

They go on to say

> 'In short, the kinds of practice represented by these workshops rely not just on analytical strategic or organisational design, but also on the crafting of process and accomplished performance in the moment' (ibid, p.620).

Engaging in consultations that were **not** designed to develop 'a superior solution' but rather to 'create the impression of agreement' is more reflective of manipulation of the workshops to achieve a predetermined outcome. Crediting this approach as exemplars of 'crafting strategy' seems at odds with Mintzberg's view of emergent strategy when he states; 'management sets out broad guidelines ...and leaves the specifics ...to others lower down in the organization' (Mintzberg 1987, p.70).

Whittington et al's example seems closer to deliberate strategy rather than emergent strategy when compared with Mintzberg's succinct view on both:

> 'A strategy can be deliberate. It can realize the specific intentions of senior management.....But a strategy can also be emergent, meaning that a convergent pattern has formed among the different actions taken by the organization one at a time' (Mintzberg 1994, p.111).

The apparent misinterpretation of what constitutes 'crafting strategy', calls into question the validity of workshop activities which they propose might contribute to emergent strategy formulation.

2.5 DISCOURSE AND DISCOURSE ANALYSIS

2.5.1 Introduction

This section reviews DA literature to provide a general understanding of DA as a methodology and to inform specific analytical methods for use in this study.

DA as a methodology is a philosophical approach to empirical research which should include 'a concern with text, discourse and context'. It also takes a 'social constructivist view of the social world' being analysed (Phillips and Hardy 2002, p.5).

Discourse analytical methods range from the micro level of analysing fragments of text (Samra-Fredericks 2003; O'Halloran 2005), through analysis of a single textual document relating to a specific topic (Eriksson & Lehtimaki 2001), to Vaara, Kleymann and Seristö's (2004) examination of material, spanning many organisations in the aviation industry.

Due to the absence of a detailed prescription of methods for data analysis Phillips and Hardy (2002, p.74) go so far as to say 'researchers need to develop an approach that makes sense in light of their particular study and establish a set of arguments to justify the particular approach they adopt.'

2.5.2 What is 'discourse'?

There are as many definitions of discourse as there are scholars studying the subject. Grant, Keenoy and Oswick (2001) identified a spectrum of definitions attributed to different authors. At its simplest it could be viewed as 'spoken dialogue' in contrast to written texts. Contemporaneous for their particular study, it could also encompass both spoken and written texts, taking an expansionist view, its definition could be broadened further to include all forms of spoken and written text.

For the purpose of this study, two definitions of discourse are particularly apt and overlapping: Potter and Wetherell (1987, p.7) consider discourse in a broad sense, defining it as '..all forms of spoken interaction, formal and informal, and written texts of all kinds.'

Phillips and Hardy (2002, p.3) refine this definition somewhat, describing a discourse as 'an interrelated set of texts and the practices of their production, dissemination and reception, that brings an object into being.'

2.5.3 Defining Discourse Analysis (DA)

DA needs to be defined for the context in which it is being used. Fairclough (2003, p.2) sees DA as focusing on language as it is used to constitute social reality. But he is careful to point out that such social reality is not only constructed through use of language, concluding that DA is only 'one analytical strategy' amongst many, which may be used in conjunction with other methodologies to study and explain social phenomena.

Potter and Wetherell (1997) also acknowledge that there are many versions of DA, a fact they attribute to the use and evolution of the methodology in a diverse range of disciplines such as psychology, sociology, linguistics and anthropology among others. They consider DA to be analysis of any of the text or spoken interactions, whether formal or informal, that are exchanged in a social context.

Fairclough went on to develop a case for using 'critical discourse analysis' as a basis for organisation studies (Fairclough 2005). His approach establishes a balance between 'extreme versions of social constructivism' in some forms of DA and his conviction that 'discourse analysis is concerned with the relationship between processes/events and practices (as well as structures), texts and discourses (as well as genres and styles)...'.

Wood and Kroger (2003) approach DA from two distinct perspectives - methodology as well as methods. From a methodological perspective, they see it as 'a perspective on the nature of language and its relationship to the central issues of the social sciences'. Relying principally on Potter and Wetherell (1987) and Potter's (1997) view of discourse as 'texts and talk in social practices' and therefore a 'medium for interaction', they see DA as an 'analysis of what people do'.

DA as used in this study reflects Potter and Wetherell's broader definition that DA 'tries to explore how the socially produced ideas and objects that populate the world were created in the first place and how they are maintained and held in place over time' (Potter and Wetherell 1987).

2.5.4 Discourse Analysis Typologies

From the many definitions of discourse and discourse analysis in the literature, Phillips and Hardy, (2002, p.20) developed a two-dimensional grid to identify DA typologies. Their grid is reproduced in Figure 4 below.

The vertical axis of the grid reflects the extent to which DA is applied to the detail of a specific text versus the overall wider context in which the discourse is taking place.
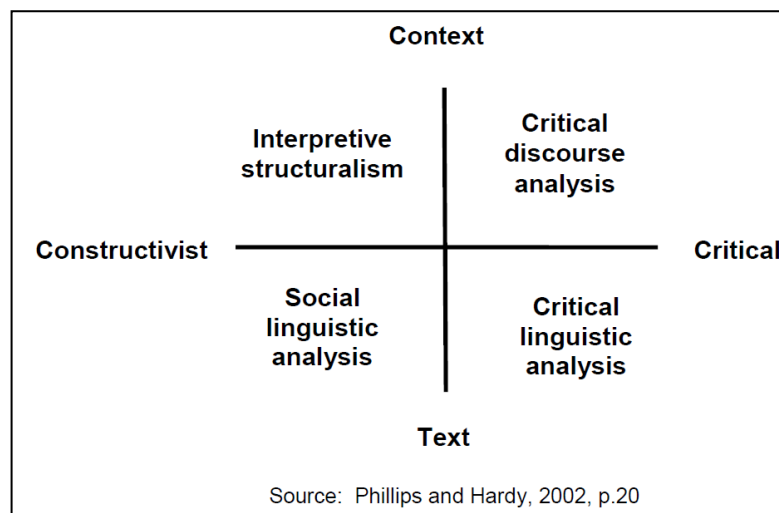
Figure 4 - Phillips and Hardy's Discourse Analysis Typologies

The horizontal axis reflects the level of granularity applied in the analysis process. The constructivist side suggests a fine-grained analysis of how a given social reality is constructed, while the critical end focuses on exploring more general factors such as power, knowledge and ideology in constructing the topic under analysis.

This study is positioned as a social linguistic analysis on Phillips and Hardy's typology grid. The fine-grained analysis of a group's discourse places it

towards the constructivist end of the horizontal axis. As the analysis is applied to a specific text - the transcript of an executive team's strategy workshop – it is positioned towards the text end of the vertical axis. While assigning a particular typology, Phillips and Hardy also acknowledge that elements of the other types may arise in any given study.

2.5.5 Bridging Methodology, Methods and Strategy

There are many examples of DA being adopted to explore specific aspects of social or organisational situations (O'Rourke 2009). As the number of such studies increased, they contributed to a body of methods which form part of the DA philosophy.

Narrative and Stories. Taking strategy as a form of narrative, Barry and Elmes (1997) apply a different (narrative) definition to strategy, which enables it to be analysed using a discourse analytic approach. Given that 'narrativity emphasizes the simultaneous presence of multiple, interlinked realities', they suggest that by seeing strategy as a narrative being told by various participants it 'highlights the discursive, social nature of the strategy project, linking it more to cultural and historical contexts'.

The story telling aspect of a narrative view of strategy can be enacted by actors from many different perspectives. It provides a rich data resource that contributes to better understanding of strategies by taking full account of the 'sociocultural contexts from which strategies arise'.

They go on to suggest that in a culture more attuned to the simple sound-bite, the output of organisation strategising may benefit from being more narrative in presentational style, both written and verbal, to compete for space in people's limited attention spans. Using narrative-based methods to analyse strategies may therefore be of some advantage in the future.

Taking a more personalised approach to stories and storytelling, Cohen & Mallon (2001) used DA to examine how researchers could use stories

generally to make sense of any aspect of people's lives. They illustrated their concept by specifically reviewing how stories assisted with analysing and making sense of 'career'. They found that telling stories enabled people to contextualise career decisions, transitions, activities and outcomes. In the hands of the researcher, they argue that stories can become a methodological tool through which sense can be made of their world.

This study identifies the tendency of one workshop participant to use stories of past experience to develop individual and collective meaning on the subject matter of the strategy workshop - adult education.

Metaphor. In looking at general interpretivist approaches to organisational discourse, Heracleous (2004) identifies metaphors as potentially constructionist, creative, action generative and potent. How they are used is largely down to context and the actors in any given situation.

Mantere and Vaara (2004) studied the specific use of metaphors as elements of strategy discourse. They identified ten metaphor families and showed the most prevalent metaphors were drawn from 'the social domains of travel, technology, mythology and science, although metaphors related to war and games were also present'.

Samra-Fredericks (2003) micro-analysis of one manager's engagement in strategy discourse shows how he made significant use of metaphor to influence the overall direction of an on-going strategy process. She characterised his ability to use metaphor as 'a tacit interpersonal skill'. This illustrates the potential importance of metaphor in strategy discourse.

In this study, metaphor use was reviewed for its potential to influence the direction of a group's discourse. It did not prove significant in this instance.

Laminating. Different fragments of a discourse can be conceptualised as laminates, or layers, which when bonded one on top of the other, 'produce something more durable and yet, still flexible' (Samra-Fredericks 2003, p.151

citing Boden 1994). Given the dominant emphasis on outcomes over formative process, this concept enables analysis of the 'how' of formative process to be transparently linked to final outcomes. It also helps to overcome some of the problems associated with linking micro level analysis of individual texts with macro level activity or outcomes in organisations or society generally (Jarzabkowski and Spee 2009, p.73; Balogun, Huff and Johnson 2003, p.198).

This concept will be referred to in Chapter 5 to show how the roles, dialogue, metaphor use and identities analysed, constitute layers that give collective meaning to the overall workshop and its outcome.

Boundary objects. Boundary objects were referred to earlier in this chapter as discursive devices which can be used by individuals or groups to construct common understanding. Thomas, Hardy and Sargent (2007) showed how DA can be used to examine such devices and to show their potential to unify an organisation behind a common understanding of an artefact (for example, a culture change toolkit) or alternatively to be divisive if used in a particular way (for example, workshops to disseminate the toolkit being used by senior managers to impose their approach to implement culture change).

This offers another way to de-construct strategy discourse using DA, with a view to improving understanding of how the strategy came about, its strengths and its weaknesses.

Discourse and strategy. A number of scholars have developed the connection between strategy and discourse. The early rational view of strategy was augmented by the strategy-as-practice view, which saw a closer link between strategy formation and the on-going discourses in organisations. However, differing views of strategy posed problems for researchers, which Hardy and Palmer (1999) sought to resolve through a model with three interlinking components: Activity, Performativity and Connectivity (see Figure 5 below).

In the model, discourse comprises three components: 'concepts' (categories, relationships, and theories), 'objects' which are the tangible embodiment of concepts (for example in processes and procedures), and 'subject position' which are people empowered to speak in a given context, on a given topic.
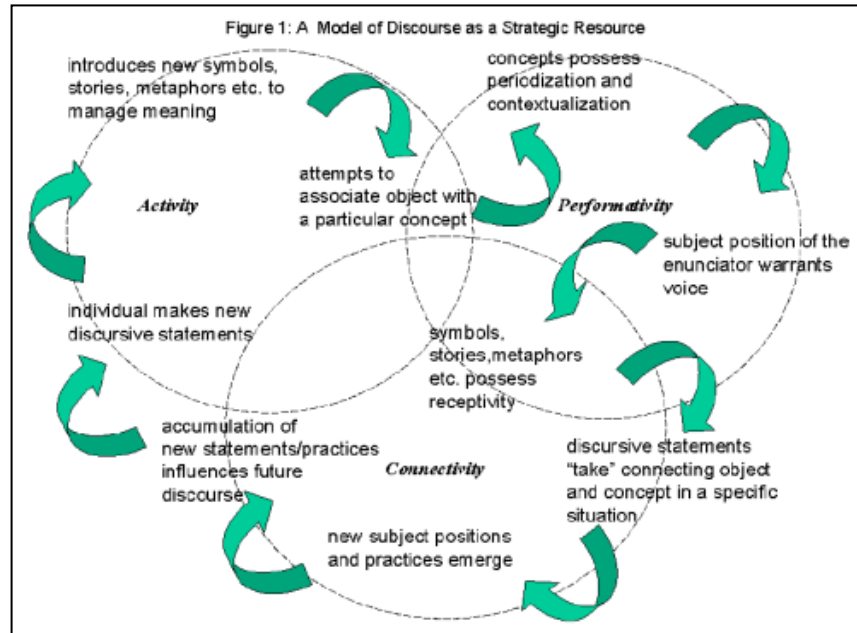
Source: Hardy and Palmer (1999, p.12)

Figure 5 – Hardy and Palmers - Discourse as a Strategic Resource.

The three circles of the model closely correlate with the 'three-dimensional' view of discourse (text, discourse and context) adopted by Phillips and Hardy (2002, p.4). The model shows how strategy is conceptually constructed by the different contributions of individuals (Activity - story, metaphor etc), linked through contextual situations or events (Performativity), ultimately leading to statements or practices which constitute new or evolving strategy (Connectivity).

This section shows how DA is an appropriate methodology for analysing strategy development and comes with a range of analytical methods appropriate to that task.

2.6   DIALOGUE

2.6.1 Introduction

At its simplest, dialogue can be defined as 'conversation between two or more people' (Gergen, Gergen and Barrett 2004). However, a more comprehensive definition is required to account for why features of some conversations have a greater impact than others.

This section reviews the literature on dialogue as an academic basis for detailed examination of conversational exchanges within the strategy workshop. Three broad perspectives on dialogue are reviewed: Formative thinking, theory and practical considerations, and dialogue in organisational discourse.

2.6.2   Formative thinking on dialogue.

Dialogue is concerned with conversation between people. David Bohm (1996) is considered one of the earliest formative thinkers on dialogue as a specific form of group conversation (Senge 2006; Isaacs 1999).

Bohm proposes that dialogue is 'a stream of meaning flowing among and through us and between us' (Bohm 1996, p.7). He proposes that dialogue aims to uncover the flaws in people's thinking, so that a group can collectively develop a better understanding of their underlying thinking and assumptions. Significantly, Bohm also believes that there should never be a winner or loser in a dialogue.

This contrasts with a discussion, the aim of which is generally to reach an agreed conclusion through analysis, or to win an argument through point-scoring exchanges (Bohm 1996, p.7; Senge 2006, p.230).

A more refined description of dialogue is; 'a discipline of collective thinking and inquiry, a process for transforming the quality of conversation and, in particular, the thinking that lies beneath it' (Isaacs 1993).

Central to both definitions is the scrutiny of individual and collective thinking.

Collectively, Bohm (1996, p.35) says that 'while we don't have "rules" for the dialogue, we may learn certain principles as we go along which help us'.

Some of these principles include: examining the whole thought process of individuals and the group (p.10), addressing the conflict of absolute necessities (p.26), suspending assumptions for open examination by the group (p.23) and developing the capacity for proprioception of our thoughts (a self-awareness of the effect our thoughts have on our dialogue) (p.28).

'Ecology of thought' is a way to characterise these collective features (Isaacs 1999, p.300). Describing personal inner ecology as 'the system of interlinked patterns of feeling and thought running through all people', Isaacs goes on to develop the concept at a personal and group level. Viewed as an ecology, individual or group thinking must be seen as a collection of interlinked parts that form a whole which is more than the sum of the parts (Senge 2006). Isaacs (1993) also notes that 'the inquiry in dialogue is one that places primacy on the whole' (p.26).

Thought tends to be reductionist in nature, in order to simplify the challenge of making sense of things and is seldom exclusively our own. It is shaped and influenced by our environment, which Bohm (1993) refers to as a 'deep structure of thought'.

Individuals may often bring conflicting views into a group discussion which they may defend as 'truth'. However groups are seldom equipped to take account of potential flaws in the thinking processes through which such 'truths' might have been formed.

This problem is dealt with in dialogue by the fundamental concept of 'suspending assumptions' (Bohm 1996, p.22; Isaacs 1999, p.134; Senge 2006, p.226). 'To suspend assumptions means to display attributions and the data that leads to them, but also to hold in abeyance and reflect on the underlying automatic process of thought that gave rise to a particular conclusion' (Isaacs 2001, p.733).

The concept of suspension and how it is achieved within the workshop discourse is examined and reported on more fully in Chapter 4 as an integral part of the analysis.

2.6.3 Theory and practical considerations for dialogue

In describing the transition from conversation to dialogue, suspension represents the junction at which conversation moves from a discussion form to a dialogic form. This is graphically illustrated in Figure 6 below (Isaacs 1993).
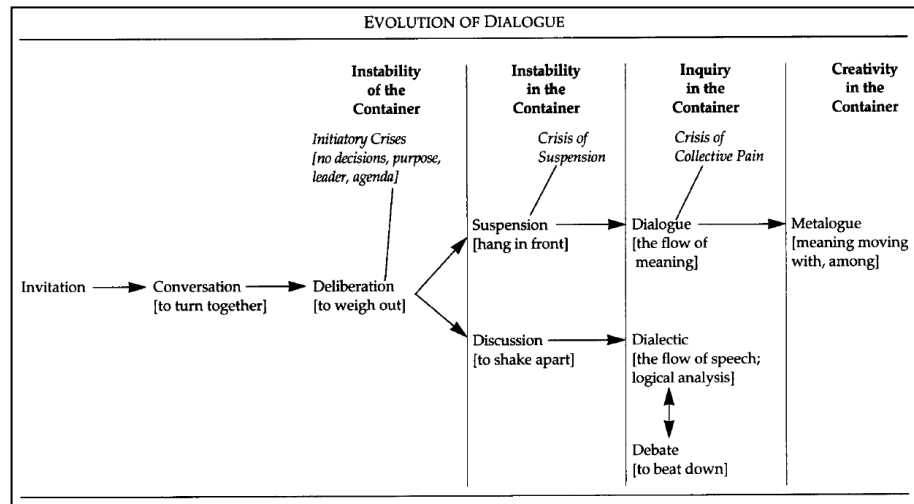
Source: Isaacs 1993, p.34

Figure 6 – Isaacs Evolution of Dialogue

In conversation (discussion), groups tend to identify specific points of shared understanding and then formulate 'a plan' to implement their shared ideas. In contrast, Isaacs considers dialogue as a way of 'participation in unfolding meaning' - conversing where meaning can be explored without being overtly explicit. This idea is captured in Isaacs' definition of dialogue: 'a sustained collective inquiry into the processes, assumptions and certainties that compose everyday experience' (ibid.).

Dialogue 'seeks to have people learn how to think together - not just in the sense of analysing a shared problem, but in the sense of surfacing fundamental assumptions and gaining insight into why they arise' (ibid.).

2.6.4 Guidelines for Dialogue

Isaacs identifies six guidelines (Figure 7 below) which should inform the use of a dialogic approach.

EXHIBIT 1
INITIAL GUIDELINES FOR DIALOGUE

- Suspend assumptions and certainties
- Observe the observer
- Listen to your listening
- Slow down the inquiry
- Be aware of thought
- Befriend polarization
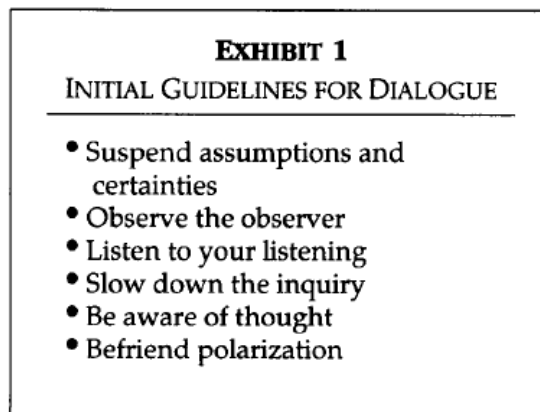
Source: Isaacs 1993, p.33

Figure 7 – Isaacs Guidelines for Dialogue

Isaacs (2001) develops an 'action theory' for dialogue, with a paradox at its core: - the requirement for dialogue to deliver explicit learning or change to justify its adoption is the point that prevents other conversation exchanges from being characterised as dialogue.

From an applied perspective, Schein (1993) characterises dialogue as 'a vehicle for creative problem identification and problem solving'. Suggesting that discussion is an equally valid approach to identify and solve problems, Schein qualifies his suggestion, saying many groups would need some type of dialogic interactions prior to engaging in discussion, to ensure they were 'talking the same language'. This directly reflects Isaac's paradox and a major challenge to have dialogue adopted in the mainstream of organisational discourse.

Schein also suggests specific features that should be displayed by the facilitator in a dialogue – 'The facilitator contributes to all of this by modelling the behaviour, by being nonjudgmental, and by displaying the ability to suspend his or her own categories and judgments.' (Schein 1993, p.35).

This indicates that the facilitator is an integral part of the dialogue process and not just a third party on the outside. This perspective provided useful guidance for analysing the facilitator's role in this study.

Innes and Booher (2000) suggest a number of specific factors that should be in place to enable 'authentic dialogue' to take place, factors such as analysis of interests and conflicts at the start, defining ground rules, group mission and tasks, to name a few. Clearly intended for large scale groups entering a formalised dialogic approach, many of these features were at best implicit for the workshop in this study. However, they prove useful for conclusions in Chapter 5 relating to adopting dialogue in strategy workshops.

2.6.5 Dialogue in discourse

Reflecting Bohm's and Isaacs' theoretical base for dialogue, Senge (2006, pp.223-231) sees dialogue as a core enabler of team learning. Seven markers or features can be inferred from Senge, which characterise conversation as dialogic: Suspending assumptions, Reflexive observation, Inquiry, Reflection, Consensus (focusing down), Consensus (opening up) and Topic expansion. The selection of Reflexive observation and Topic expansion in this study as a basis for analysing the workshop proceedings is explained in Chapter 4.

From an organisational discourse perspective, Gergen, Gergen and Barrett (2004) define dialogue more generically as 'discursive coordination in the service of social ends'. They identify 'moves' that should be present in what they term 'generative dialogue, dialogue that brings into being a mutually satisfying and effective organization'. Six such 'moves' may be inferred from their work: Affirmation, Productive difference, Coherence (Metonymic reflection), Coherence (repeating), Coherence (answering) and Repetitive sequences. Affirmation and Productive difference will be used in this analysis, which is explained in more detail in Chapter 4.

2.6.6 Suspending Assumptions

> 'The object of dialogue is not to analyse things, or to win an argument, or to exchange opinions. Rather it is to suspend your opinions and to look at the opinions – to listen to everybody's opinions, to suspend them, and to see what all that means' (Bohm1996, p.30)

Dialogue, as defined in the academic literature, could be characterised in the following ways:

- It is a structured form of conversation with specific characteristics.
- It is normally facilitated.
- It can take a considerable number of meetings for participants to become comfortable or proficient with its techniques
- Its primary purpose is to build shared understanding, not agreement.
- It may lead to agreement, decisions or some other tangible outcomes, but these are not its primary purpose.
- To be most effective it is dependent on all parties learning and implementing the fundamental concept of suspending assumptions (Bohm 1996, p.22; Isaacs 1999, p.134; Senge 2006, p.226)

Dialogic exchange is both a learned skill and a process, for individuals or groups. It can take considerable time to learn and may be represented as a four-stage process (Isaacs 1993 - see Figure 6).

Suspending assumptions is a fundamental and essential feature of dialogue. It is normally presented and explained in detail to participants at the start of a dialogue session. The concept requires participants to reflect on the assumptions they bring to a conversation and to have those assumptions scrutinised in detail by the other participants. It is normally an explicit activity in a dialogic conversation which is strongly guided by the facilitator. Bohm (1996) and Isaacs (1999) go further and identify thoughts and the process of thinking as the fundamental 'assumption' which should be 'suspended' for reflection and scrutiny. By highlighting potential incoherence in individuals' thought, suspending assumptions seeks to improve the coherence of the group's collective thought (Senge 2006, p.225-226).

Through suspending assumptions for open scrutiny, all participants should come to a better understanding of why people hold the views they do. This provides the foundation to build shared understanding.

Viewed in this context, using 'suspending assumptions' as a basis for analysis of this workshop's proceedings presents a number of problems:

- The workshop was not set up as a group dialogue.
- Suspending assumptions was not explained at the start.
- There was no provision in the workshop agenda for the explicit suspension of assumptions.
- In a classic sense, suspending assumptions is practiced by participants on their own assumptions before anyone else's assumptions.

Notwithstanding the above, the concept is closely related to three of the indicators used to analyse the workshop proceedings – Affirmation, Reflexive Observation and Topic Expansion.

Affirmation as proposed by Gergen, Gergen and Barrett (2004) involves different ways of acknowledging other people's ideas and perspectives. It may be positive or negative, but essentially involves acknowledging the validity of other views, whether agreeing with them or not. As such, it requires a measure of joint examination of those views to at least understand their foundation. This is similar to suspending assumptions.

Reflexive Observation is grounded in Senge's (2006) concepts of reflection and inquiry. It requires a measure of objectivity and willingness to self-examine both the negatives and positives in what we do and think. In this regard, it closely relates to the underlying concept of suspending assumptions and therefore provides a perspective on the extent to which this was happening in the workshop.

Topic Expansion requires participants to view their conversation subject from many different perspectives, which are founded on individuals' thoughts and thought processes. It is similar to suspending assumptions in that it requires exploration of underlying thought surrounding a given topic.

2.7   CONCLUSION

The gap between the rationalist strategy literature and actual strategy practices created the need for Strategy-as-Practice literature and research.   The development of strategy from rationalist origins to the Strategy-as-Practice literature underpins the use of workshops for strategy development. Strategy workshops are a common strategy tool for many organisations but are acknowledged as under-researched and under-reported in the literature. This provides an opportunity for this research to contribute to the strategy literature in general and to the S-as-P literature on strategy workshops in particular.

Discourse Analysis, particularly as applied to strategy development, offers an appropriate way to analyse the proceedings of a strategy workshop. Literature on dialogue enabled 'dialogic indicators' to be developed as a basis for using DA to analyse this aspect of the workshop discourse.

CHAPTER 3

METHODOLOGY AND METHODS

3 METHODOLOGY AND METHODS

3.1 INTRODUCTION

This is an action research, empirical study, based on an interpretivist philosophy (Saunders, Lewis and Thornhill, 2003, p.101).

The study is situated at the intersection of two broad areas of academic research:- Strategy workshops reflect a strategy development ontology, while data analysis is guided by a social constructivist epistemology drawn from DA.

The choices made regarding methodology and methods were driven by the requirement to answer the research question:

> How do discursive interactions in a facilitated strategy workshop define and refine a strategy problem and associated response?

This chapter describes the methodology and methods used for the collection and analysis of the research data. It begins by explaining the development of the research question (Section 3.2). The origins, relevance and suitability of the unit of analysis are then explained along with a typology for the participants in the workshop.

DA as a methodology was adopted some time into the research. The factors considered in selecting DA are outlined along with the particular form of DA that was finally used (Section 3.3).

Initially, three sites were approached as potential sources for primary research data. The process for selecting sites is described, along with the collection of primary research data and why the data for analysis was finally narrowed to one research site (Section 3.4).

MS Excel was used as a data analysis tool. The mechanics of the data analysis methods are briefly described, followed by a description of the iterative analysis stages involved.

The chapter concludes by identifying some of the limitations inherent in the study's methodology (Section 3.7).

3.2   RESEARCH TOPIC, IDEA AND RESEARCH QUESTION

3.2.1   The Research Topic and Idea.

A layered approach was used to develop the research topic, idea and research question (Hogan et al 2009, p.1; Creswell 2009, p.129).

The research topic concerns how organisations formulate strategy to deal with an unexpected crisis, particularly where no provision was made for such crisis in existing strategic plans.

Within this topic, the research idea draws on strategy-as-practice, particularly the practice of strategy workshops and how they are used to inform and develop strategy.

3.2.2   The Research Question.

The research topic and the research idea provided the context for developing the Research Question. An iterative process was used to refine the final RQ from a DA perspective (Phillips and Hardy 2002, pp.61/62/67/69; Potter and Wetherell, 1987, p.160).   The final research question is:

> How do discursive interactions in a facilitated strategy workshop define and refine a strategy problem and associated response?

3.2.3   Unit of Analysis.

A single Executive management team's strategy workshop is the unit of analysis for this study.

Jarzabkowski & Seidl (2008) used 'strategy meetings' as their unit of analysis to study 51 'strategic episodes'. They showed 'how meeting structures shape the strategic interactions taking place within them'. Whittington et al (2006) used 'tools and procedures' in a change process as their unit of analysis. A management workshop was one element of their unit of analysis.

Taking a single strategy workshop as a unit of analysis allows a number of specific features to be examined in detail, which define how strategy is being developed. It also enables analysis of these features collectively, to understand how they interact in the workshop context, to support strategy development. Combined this is an effective unit of analysis to answer the Research Question.

3.2.4 The Actors.

Workshops cannot happen without people. Using the workshop as the unit of analysis implies study of how and what the participants do in the workshop (Potter and Wetherell 1987; Potter 1997). Within the ontology identified by Jarzabkowski & Spee (2009, pp72), the organisation's participants in the strategy workshop can be categorised as 'aggregate actors' since they act in this context as a single executive management team. The workshop facilitator on the other hand is characterised as an extra-organisational actor within the ontology.

3.3   TOWARDS A DISCOURSE ANALYSIS METHODOLOGY.

3.3.1 Changing to a DA approach

Traditionally, HE organisations have used structured strategic planning processes or 'strategic programming' (Mintzberg 1994), to develop their strategic plans (ESTIP 2008). However, little is known about how they formulated their underlying strategy or 'strategic thinking'.

Dynamic capabilities were initially considered for use in this research as a means to study strategy formulation. Semi-structured interviews with Executive managers in three organisations were the intended source of primary research data.

Using strategy workshops with Executive teams (in three organisations) was an alternative approach. Discourse Analysis (DA) could provide both a methodology and suitable methods to analyse how the Executive team's workshop discourse contributed to their strategy development.

There were a number of concerns with making such a significant change in approach near the mid-point in the research:

- Previous work on Dynamic Capabilities would likely be redundant.
- DA was a new discipline for me, with a consequential impact on time and resources for the study.
- Executive teams would select the workshop topics, leaving the initial focus of the research unclear.

- There would be significantly less clarity on the potential outcome of the research.

There were also some advantages to changing approach.

- It offered an opportunity to learn a new analytical approach.
- Rare 'live' data from Executive strategy workshops could be used, as opposed to opinion and recollection based data from semi-structured interviews.
- It offered the potential to get a new insight into the operation and dynamics of strategy workshops.

Some challenges associated with changing the approach were:

- Arranging three Executive strategy workshops within a relatively short (four week) period.
- Additional reading to learn the unfamiliar discipline of DA.
- Changing from a developed research topic and idea, to a new methodology and intensive data gathering exercise, but with little clarity at the start of where the study might finish.

3.3.2 Discourse Analysis Methodology

In DA methodological terms, this study could be categorised as Social Linguistic Analysis (Phillips and Hardy, 2002, p.20) (see Figure 4, Section 2.5.4).

On the spectrum between Constructivist and Critical, the workshop discourse is a means for the Executive to construct the strategic problems to be addressed and how to address them. The analysis is focused on a detailed examination of how their discourse constructs this reality.

The vertical axis of the grid ranges from Context to Text. In this study, while the context of the workshop is described and explained in some detail, the analytical focus is on the specific 'text' generated from the strategy workshop recording. The transcript was used to carry out a detailed examination of specific features of the workshop discourse.

Potter and Wetherell's (1987) ten stage process for analysing discourse also informed this study. Figure 8 below illustrates the stages.

Ten Stages in the Analysis of Discourse

Stage 1 — Research question → Stage 2 — Sample selection → Stage 3 — Collection of records and documents → Stage 4 — Interviews → Stage 5 — Transcription → Stage 6 — Coding

Stage 10 — Application ← Stage 9 — Report ← Stage 8 — Validation ← Stage 7 — Analysis ← Stage 6 — Coding

Source: Potter and Wetherell, 1987, p.160
Graphic: by researcher.
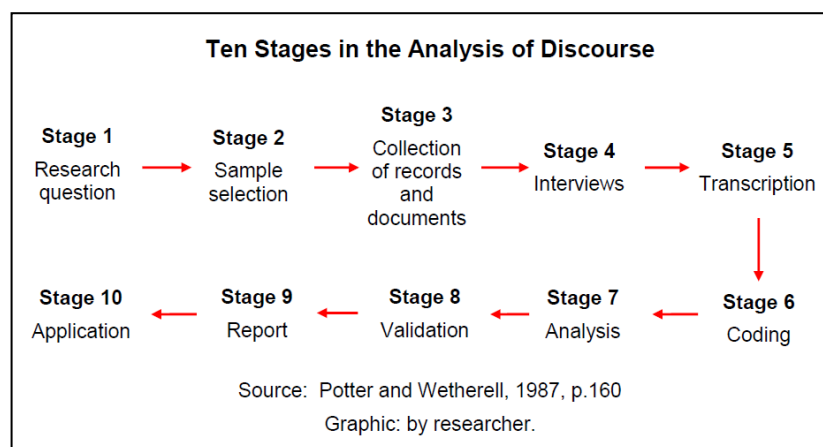
Figure 8 – Potter and Wetherell's Ten Stages of DA process

While their approach is represented as linear and sequential, it was not applied in this way in practice. The ten steps were actioned to varying degrees over the course of the research (Potter and Wetherell 1987). This approach is supported by Wood and Kroger (2000, p.96) who say;

> 'there is no necessary sequence of activities, no standard or required way of carrying them out. In part this is because techniques that researchers use "rely as much on what Schenkein (1978) described as the 'conversation analytic mentality' [or more generally the discourse-analytic orientation] as on any formal rules of research methods" '

Detailed analysis of the workshop transcript represents the heart of the research. Specific methods for this are not strongly prescribed in the literature (Phillips and Hardy, 2002, p.74). Due to the breadth of topics amenable to DA, Phillips and Hardy go on to suggest that 'researchers need to develop an approach that makes sense in light of their particular study and establish a set of arguments to justify the particular approach they adopt.'

Grant, Keenoy and Oswick, (2003, p.8), (citing Fairclough's (1992) three dimensional framework), suggest that discourse could be analysed at three levels: (1) at individual text level, (2) as a process that generates the text or (3) as a context in which the text generation process resides. The approach adopted in this study is a combination of (1) and (2) - the strategy workshop comes within a wider strategy process but the main analytical focus is on the single text transcript of the workshops proceedings.

Samra-Fredricks (2003) and O'Halloran (2005) provide examples of ethnographic based studies which select specific texts for analysis but also select data sub-sets from those texts for fine grained analysis. This study differs from their approaches and may be considered a 'meso-discourse' study (Hardy, 2001, p.32), in that the full text of the workshop's proceedings is analysed to identify higher level features of the discourse that may inform the groups definition of a strategic problem and initial steps to address the problem.

3.4   SOURCES OF PRIMARY RESEARCH DATA

3.4.1 Selecting Research Sites.

A consulting history with particular sites was the principal driver for site selections for this study (Phillips and Hardy 2002, p.70). Three sites were initially contacted to seek their involvement. There were a number of other reasons for their selection:

- The executive management teams and the researcher were known to each other due to previous consulting engagements on each site.
- Each site faced a range of challenges from the recession that required a strategic response.
- The executive management teams on each site were willing to take part in a facilitated strategy workshop.
- Each site could identify a particular topic which they could explore in a strategy workshop.
- They were sufficiently similar to enable comparative analysis if the final data assembled supported or required this approach.

3.4.2 Initial Contact.

Contact with each site was initiated through an informal phone call with the Chief Executive Officer (CEO). This was followed by an e-mail (see Appendix A), outlining the proposed research approach.

One of the three sites didn't respond for a number of weeks and due to time constraints, it was not feasible to conduct a workshop within a time scale that suited both parties. The study proceeded by collecting data from two sites. To preserve anonymity for each site, they will be referred to here as Site A and B.

The organisations were offered two approaches for conducting the workshops:

- They could be managed and run by the participants, with the researcher as a passive observer and recorder.
- They could be facilitated by the researcher, similar to previous workshop facilitation done for them on a consultancy basis.

Both organisations opted to use the facilitated approach, with the consequence of bringing the facilitator's activity within the analytical remit. The workshops were arranged by the facilitator (researcher) as normal commissioned facilitation work, but the researcher was not remunerated for them.

3.4.3 Suitability of Workshops for Data Gathering.

Balogun, Huff and Johnson (2003) developed five criteria for assessing the usefulness of data gathering approaches, such as workshops. The strategy workshop in this study was assessed against the five criteria and the results are shown in Table 1 below.

Suitability of strategy workshop as a data gathering medium

Legend: [Very suitable] [Moderately suitable] [Not suitable]
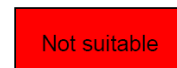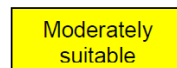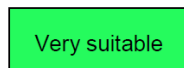
(1) Provides evidence/data that is both broad and deep because it is	
• contextual	🟩
• longitudinal	🟥
• facilitates comparison across sites	🟥
• can be collected at multiple organizational levels.	🟩
(2) Elicits full and willing commitment from informants because it is	
• interesting enough to engage organizational commitment	🟩
• enjoyable enough to sustain commitment over time.	🟩
(3) Makes the most effective use of researcher time because it	
• collects	🟩
• organizes	🟩
• analyses, large and varied amounts of evidence.	🟥
(4) Anchors the majority of questions being asked in organizational realities because it	
• is sensitive to multiple definitions of critical issues	🟩
• addresses problems of interest and relevance	🟩
• involves organizationally based collaborators.	🟩
(5) Goes beyond research based feedback to	
• contribute to organizational needs	🟩
• provide informants with personally useful insights	🟩
• inform the content of further collaboration.	🟩

Source: Balogun, Huff and Johnson 2003, p.200-201.
Format and application by researcher.

Table 1 – Suitability Criteria for Data Gathering

The strategy workshop in this case proved to be particularly suitable when subjectively measured against the tabulated criteria.

3.4.4 Arranging Workshops

Site A. The strategic topic for discussion was adult education. An initial phone call to the manager with operational responsibility for adult education was followed by a one-hour, face-to-face meeting. The background to the topic was discussed. It was agreed that the workshop would last approximately one hour. The facilitator prepared a briefing note and draft agenda for the other executive managers (see Appendix B and C respectively). Five of the Executive management team were scheduled to take part in the workshop.

The room layout was conventional boardroom style. Participants were seated as they had been for the preceding executive meeting. Notes were taken on a laptop throughout, to provide a summary and action list following the workshop. The workshop proceedings were also recorded on a digital recorder, to prepare a transcript for later academic analysis.

Site B. The topic for this workshop involved the possible merger of the organisation with parts of another organisation. The CEO prepared a detailed briefing sheet for the workshop. This was also used to brief the facilitator (researcher) and to prepare a draft workshop agenda (See Appendix C). The facilitator circulated the agenda to the participants prior to the workshop. Each Executive member was offered the opportunity to contact the facilitator prior to the workshop to discuss any aspect of the proposed agenda. Eight managers were scheduled to take part in the workshop.

Consent forms. A participant consent form was developed for this study (see Appendix D). A copy of the consent form was sent to each manager at least one week before the workshops. The form was reviewed immediately before the start of each workshop and participants signed an individual copy. Completed consent forms have been retained by the researcher.

Workshop recordings. The workshops were recorded on a Sony ICD-SX700 digital recorder, with a backup made on a Sony micro cassette M-100MC.

3.5   MECHANICS OF DATA ANALYSIS

3.5.1 Tape Transcription.

Data analysis began by transcribing the workshop recordings from Sites A and B, using Sony Digital Voice Editor Version 3.2 software to control play back. Transcription was captured in MS Excel (2007), in an initial format as shown in Figure 9 below:

Turn	Speaker	Text	Counter

Figure 9 - Initial Excel analysis format

Each speaker was identified by an abbreviated pseudonym and the text was entered alongside.   The counter number indicates the end position (in hours:minutess:seconds) of each person's contribution. Following a decision to only use the text from Site A, a second review of the recording made the following adjustments:

- Refined the accuracy of the transcript.
- Inserted basic transcript notation (Appendix F).
- Assigned a sequential turn number for each speaker's contribution.

A basic level of notation was considered appropriate for this analysis, since the focus was on the broad linguistic interactions between the workshop participants rather than on a micro analysis of all of the linguistic attributes of each speaker.

3.5.2 Selecting Transcript for Detailed Analysis.

The original intent was to use 'texts' or 'discursive units' (Hardy, 2001, p.26) from three sites.   One sites' workshop was cancelled due to scheduling problems.

Transcription commenced immediately after each workshop. An initial impression was formed on the relevance of the workshops to each other. While the context for each was similar, there were significant differences in content. Site A had a relatively broad topic for discussion, small number of participants and a loosely structured workshop format. Site B in contrast had a very specific topic for discussion, a workshop double the length of Site A's and double the number of participants. There were three principle reasons for concentrating on one transcript for the detailed analysis stage:

- There appeared to be insufficient overlap in the two workshop proceedings to merit a joint study.
- Time availability could constrain an adequate analysis of two workshop proceedings.
- There was sufficient material in one workshop's proceedings to provide a basis for a master's level dissertation.

3.5.3 Data Transcription and Analysis.

MS Excel was used to transcribe and analyse the data. Its principle advantage was the ability to filter data using multiple criteria. Data could be viewed by any combination of speakers, allowing flexible comparison of individuals' themes, statements or other responses. Specific themes raised by individuals (such as use of metaphors, handling disagreement, societal attitudes, policy etc) were a key factor in identifying role construction by individuals through their discourse. Colour coding text also helped data analysis.

Filtering different columns by themes and then by speaker provided visibility of who was speaking to each theme. Review of exchanges between participants by theme was then possible, providing a rich form of analysis. The full transcript text was always available by simply unfaltering all columns.

Exhibit 1 below shows a filtered extract illustrating how representing adult education by use of metaphor was created for analysis. Turns were first coded for the 'representing' and 'metaphor' themes. Metaphor was then applied as the first thematic filter, followed by the single 'Representing' theme of 'Adult learning'. This filter combination identifies three speakers whose discourse links these two themes. Such quick and simple filtering enabled detailed and

close comparison of individuals' exchanges on any combination of themes. It also aided viewing how participants reacted to comments made on a topic, even when a number of turns removed from a topic first being raised.

Turn	Speaker	Text	Counter	Representing (Bold text)	Metaphor
14	QE	And **this other piece is on the fringe**, and no matter how we do it, **it seems to always be on the fringe**, even though we talk about a strategic plan, you know it's part of our mission, it's a critical part of our mission and all that, **it's still fringe**, it's always look I'm doin continuing education cost plans today we approve them today ad-hoc. Now here we are, at the end of the event, we do them in August, we won't do that for CAO. We just don't. So it's, there's something about how we think, and I think DT is right, I think that the whole recession is actually throwing all the thinking in the air, so it's going to **fall down in a different way**. But whether it **falls as a mashed and integrated to the extent that we'd like I don't know**. I just know it'll be different , because **everything is on the table now**.	00:15:11	Rep Adult learning	Metaphor
21	OD	But that's a serial change, if you were to place yourself in the adult learners boots, and say what does it cost me to go to education at the moment if I had a degree from a private college, and I come here for another one, I pay through the nose for the fees. If I come in the evening time, I pay through the nose for the fees, but **the more recent labour activation stuff has been the first time the state is funnding ahh second education if you like, and that has opened a bunch of doors so there is** a chink in the armour of the state which says I never pay for part time and I never pay for second level.	00:17:28	Rep Adult learning	Metaphor
91	ML	and I know myself when I went back **the value of the space as an adult was more valuable than the actual content that I was engaging with** and one of the guys that I had to study was Pierre Borjeau, and he uses this word 'symbolic violence', and I never fully understood it, and he would suggest that what we're do to (external company) is actually violence,	00:44:42	Rep Adult learning	Metaphor

Exhibit 1

Wood and Kroger (2000, p.136) caution about using quantification in DA, given DA's focus on 'what people are doing or not doing, how they are doing it, and how it is connected to other things they are doing rather than how often they are doing it....'. They argue that quantification can be contextually inappropriate, cause meaning to be glossed over or induce a false sense of meaning where averaging is used. Notwithstanding Wood and Kroger's caution, Excel facilitated basic quantification of individuals' contributions as a precursor to detailed analysis (see Sections 4.3.1. and 4.6.2)

MS Excel limitations. Due to the nature of the group's discourse, some turns were particularly long, exceeding one minute. This highlighted the limited number of characters which can be carried in a single cell in MS Excel. This required some turns to be recorded over a number of cells but didn't significantly interfere with detailed data analysis.

3.6   STAGES OF DATA ANALYSIS

An iterative approach was used to analyse the data, which Wood and Kroger (2000 p.96) describe as 'scaffolding' and was similar to that used by Thomas Hardy and Sargent (2007).

3.6.1 Initial Thematic Analysis.

Preliminary data analysis focused on categorising turns under three broad themes: personal identities, relationships and representation of topics (Fairclough and Woodak, 1997, as cited by Hardy, 2001, p.27; Wood and Kroger 2000, pp.29-30). As refinements were made under the three themes, more specific sub-themes were identified, covering areas such as Government policy, attitudes to adult education, staff dispositions and so on. While more refinement seemed possible, it wasn't particularly fruitful in understanding **how** the group's discourse was constructing their strategy.

Metaphor use was also analysed. Although marginally more promising, it too provided little insight on **how** the group's discourse informed their strategy development.

After this initial refinement, the original audio recording was reviewed in full again to identify any other discursive attributes. This provided an unexpected insight on two aspects of the group's discourse;

> 1.   Individuals' contributions seemed to form a unique pattern, contributing to different roles within the group's discourse.
> 2. The whole group seemed to have a dialogic as opposed to discussion based form of exchange (Senge, 2009; Isaacs 1999; Bohm 1996).

These new insights formed the basis for a third analytical iteration which became the principal focus of this study.

3.6.2 Identifying Roles within the Group.

The third review of the recording discerned how the participant's contributions on themes defined distinct roles within the group. These roles are described in detail in Chapter 4 and contribute to examining the workshop topic from multiple perspectives. They also support a dialogic discourse, a balanced exploration of the topic in hand and a consensus based outcome.

3.6.3 Developing a Basis for Dialogue Analysis.

'Dialogic indicators' were developed from Gergen, Gergen and Barrett (2004) and Senge (2006), as shown in Table 2 below, enabling a closer analysis of the text. Gergen at al were selected due to their particular focus on dialogue in an organisational context while Senge was used because of his practical focus on team learning and interactions.

Gergen et al (2004)	Senge (2006)
Affirmation	Topic expansion
Productive difference	Reflexive observation
Coherence (answering)	Inquiry
Coherence (repeating)	Suspending assumptions
Repetitive sequences	Consensus (focusing down)
Coherence (Metonymic reflection)	Consensus (opening up)
	Reflection

Table 2 – Dialogic Indicators

Preliminary analysis looked for the dialogue indicators in each turn. Where turns had more than one indicator, the dominant indicator was assigned.

In a second iteration, four of the dialogic indicators were used: Affirmation, Topic Expansion, Productive Difference and Reflexive Observation. These four were chosen for a number of reasons:

- Topic Expansion and Reflexive Observation provided a broad analytic perspective.
- Affirmation and Productive Difference offered scope for a more fine-grained analysis.
- They were the most frequently observed in the initial analysis.
- They represent foundation indicators without which a dialogic approach cannot take place.

Suspending assumptions is considered fundamental to dialogue (Bohm 1996, pp.22-24; Isaacs 1999, p.134; Senge 2006, p226), but was analysed in the context of the other indicators, rather than as an indicator in its own right. This is explained in detail in Chapter 5.

3.7   LIMITATIONS OF THIS STUDY

'The aim of discourse analysis is to identify (some of) the multiple meanings assigned to texts,' (Phillips and Hardy, 2002, p.74). Only the text from one of two workshops from the data gathering phase was analysed in detail in this study. The study focused on three primary features of the discourse – its structure, participant roles and dialogue.

As a meso-discourse study (Hardy, 2001, p.32), it took a broad view of how the group's language helped to construct a dialogic exchange and how role construction by participants enabled a more thorough examination of their topic during the workshop. However, the data available is sufficiently rich to support analysis from other perspectives (Wood and Kroger 2000). There may be many other features within the text which could come to light from other similar studies, but were outside the scope of this work.

A further limitation of the study is the absence of any follow-up research on the impact of the workshop discourse on completing the strategy development around adult education. The analysis represents a snap-shot of how an executive team's strategy workshop <u>contributes</u> to strategy formulation, rather than fully formulating strategy in a single event.

Finally, the study represents one interpretation of a group's discourse, set in a specific context. Care is therefore needed if any lessons drawn or inferred from the analysis are carried forward to other contexts, similar or different.

3.8   CONCLUSION

This chapter explained how the research question was iteratively developed through consideration of a broader research topic and idea. The reasons for adopting DA as the principal methodology were explained, along with an outline of the concepts defining DA.

The process for collecting the primary research data was explained and the workshop as a collection medium was positively assessed against criteria developed by Balogun, Huff and Johnson (2003).

The mechanics of transcription and the use of MS Excel were described along with the advantages and disadvantages of using these tools. MS Excel proved to be an effective and flexible tool for the multi-level comparison of turns required for this study.

The mechanics of the stages of data analysis, from themes, through roles and ending with dialogue, were described. The Chapter concluded with an outline of the limitations of the study and the methodology used.

CHAPTER 4

RESEARCH CONTEXT, TEXT ANALYSIS

AND FINDINGS

4 RESEARCH CONTEXT, TEXT ANALYSIS AND FINDINGS

4.1 INTRODUCTION

4.1.1 Overview

This study is conducted in the context of the Higher Education sector in Ireland. The strategic importance of adult education, and the impact of the 2008 recession are initially outlined in Section 4.2. It also profiles the organisation in which the workshop for this study took place.

Within this context, the data analysis focused on answering the research question:

> How do discursive interactions in a facilitated strategy workshop define and refine a strategy problem and associated response?

The first level of analysis applied to the workshop shows how the group's discourse differed from the structure proposed by the facilitator and how it went through three phases (Section 4.3). The use of metaphor within the discourse was explored (see Appendix G for detailed analysis) but only contributed in a minimal way to constructing strategy. The construction of organisation identity also had limited impact. One individual created an identity in substitute for the CEO. Their adoption of a facilitative, leadership approach helped to steer the workshop towards a tangible output but didn't materially impact on the content of the strategy being developed (see Appendix H for detailed analysis).

Working backwards from the workshop outputs (Samra-Fredericks 2003, p.167), the need to change the strategic vision for adult education was found to be implicit in the group's discourse and was only made explicit at the end of the workshop (Section 4.4). The group's representation of societal mindsets and internal organisational attitudes are also shown to implicitly justify the need for a new vision for adult education.

Each participant represents adult education in different ways. The analysis shows how each participant played different roles through their representation of adult education and how this facilitates exploring adult education from multiple perspectives (Section 4.5).

Finally, the analysis shows how the group's discourse followed a strong dialogic pattern throughout the workshop (Section 4.6) and how this contributed to a balanced inclusion of everyone's views and a consensus based workshop output.

4.1.2 Note on the Workshop Context.

The workshop took place immediately after a routine Executive team meeting. Due to an overrun, the CEO was unable to attend the strategy session. Informal (and unrecorded) discussion before the workshop considered the CEOs non-availability. This affected the group's perception of the progress they could make and decisions they could take at the workshop. The CEO's absence is shown to have had a bearing on the identity constructed by one individual (see Appendix H), but not on the overall formation of strategy in the workshop.

4.1.3 Note on exhibits from the transcript.

To preserve confidentiality, the name of the organisation has been substituted in the transcript with the phrase *Our Organisation*. People's names were substituted with their abbreviated pseudonym or with 'name 1' if they were someone external to the workshop. These changes are reflected in the exhibits used from the transcript.

4.2   THE IRISH HIGHER EDUCATION CONTEXT

This section describes the wider context in which the study was situated.

4.2.1   The General HE environment in Ireland

HE in Ireland is dominated by seven Universities and fourteen Institutes of Technology.   Private, third level teaching organisations have a limited influence in the sector (OECD 2004).   In a country of limited population, this is a relatively high number of HE colleges, occasioning a high level of competition for both students and resources.   The organisations are spread evenly throughout the country.

The overall mandate of HE organisations is prescribed in national legislation; The Universities Act 1997 and the Institutes of Technology Act 2006.

One of the main policy objectives of higher education in Ireland is the 'adoption of lifelong learning as a planning motif in higher education' (OECD 2004, p.7).   The OECD reports 'the age participation rate rising from 11% in 1965 to an estimated 57% in 2003 and in numbers from about 21,000 in 1965 to over 137,000 by 2003 (Department of Education and Science Ireland)'. With over 90% of that expansion arising in the 18 to 20 age group, the report notes 'Lifelong learning, widening participation and the encouragement of mature students to enter tertiary education have not been given such emphasis and must be reinforced in the future'.

This provides the macro, national context in which adult education was viewed as strategically important by the executive management team in this study.   As illustrated in Exhibit 2 below from the workshop transcript, they also viewed adult education as strategically important for internal reasons.

17	**OD: When we started off with a strategic plan back about eight years ago we said we were going to get about half our students through continuing ed and half through the CAO, and when you crunch the numbers you actually can't do that.**

Source: Transcript from audio record of the Executive management team's strategy workshop, starting at time mark 00:16:10.

Exhibit 2

With tightening budgets, less demand from industry and a national population less able to pay for continuing education, adult education as a revenue stream and as a social imperative takes on ever-increasing strategic significance.

4.2.2 Impact of Recession on the HE Sector

In September 2008, Ireland had entered a recession that was projected to be one of the most severe economic down turns in the States history. The following were part of the Government's response in the HE sector;

- Demand for a 3% reduction in staff costs in 2008 and in 2009
- Reduction in annual budget allocation to individual HE organisations.
- Provision of limited funds to encourage the Universities and Institutes of Technology to provide special programmes for unemployed citizens.

Due to the poor availability of jobs, enrolments in HE from the 18 to 20 year old cohort climbed from 49,334 (2007/8) to 52,295 (2008/9) for full-time undergraduate places (HEA, 2009). The impact of recession was further felt through a decrease in the number of bespoke programmes required by industry, resulting in a corresponding drop in income. HE organisations were required to do more work with less resources.

4.2.3 Initial organisations for this study

Three HE organisations were initially approached to take part in this research.

A strategy workshop was arranged for two of the three organisations. The topics chosen for the workshops were quite disparate; merging organisation functions and adult education (see Appendix C). The workshop selected for detailed analysis discussed adult education as their strategic topic.

4.2.4 The Subject Organisation

To preserve confidentiality, it is only possible to provide an outline of the individual organisation whose workshop became the sole subject of this study.

The geographic region in which the subject organisation is located is prone to relatively high unemployment. This offers opportunities to provide a service to people who may need to improve their qualifications but who, without Government support in the recession, may not have the personal finance to attend adult education classes.

As full-time student numbers increased, Government and industry funding decreased, leaving the HE organisation with an increasing challenge to maintain income levels. Adult education is a significant source of such funding and further highlights its strategic importance for dealing with the challenges of the recession.

The organisation has a number of niche programmes which are offered to both full-time and part-time students. Without the critical mass of very large HE organisations, they are more dependent on the income derived from adult education. Due to their geographic location, they also see adult education as an implicit part of their overall purpose, as stipulated in national legislation.

4.2.5 The Participants

The management team taking part in the workshop was small due to non-availability of all of the executive managers. As a group, the team has worked together for a number of years. As part of their organisational development programme they attended both personal and group development activities over the years and were very familiar with each other's personality profiles. Three participants recently undertook adult education programmes at various levels in other HE organisations.

I, as workshop facilitator, was known to all members of the Executive management team. I previously worked with the executive team on other occasions, both as a consultancy adviser and as a co-participant on other activities within the sector. This provided ready access to the team and allowed the workshop to be set up at relatively short notice. It also enabled us to minimise the normal warm up activities that might be associated with the 'transition phase' of such workshops (Johnson, Prashantham and Floyd 2005) and to 'cut to the chase' in the workshop, by moving directly into discussion of the topic in hand.

4.3   OVERVIEW OF THE WORKSHOP DISCOURSE

4.3.1 Introduction

Table 3 provides a summary of each participant's engagement in the workshop.

Wood and Kroger (2000, p.136) identify potential problems with generating quantitative data from text when using DA (see section 3.5.3, Data transcription and analysis).

Speaker statistics			
Speaker	Speaking time per participant	No of turns per participant	Average time per turn
DT	00:24:42	47	00:00:32
DM	00:12:50	36	00:00:21
OD	00:15:16	61	00:00:15
QE	00:08:30	36	00:00:14
ML	00:18:15	49	00:00:22

Table 3 - Speaker Statistics

These statistics illustrate three main points:

- The average length of turns is considerably longer than in interview-based studies, resulting in relatively large exhibits from the transcript.
- QE had the least speaking time, fewest turns and shortest average turn duration, yet will be shown to have the greatest impact on shaping the final outcome of the workshop.
- The dialogic pattern of the group's discourse and the roles adopted during the workshop may help to explain why the quantity/duration of contribution wasn't an indicator for influencing the final outcome.

4.3.2 Workshop Structure and Phases

The agenda for the workshop (Appendix C - Site A) had four principle steps - establish a common understanding of the topic, identify key strategic issues, prioritise the issues and identify initial actions.

In contrast to the planned agenda, the workshop's overall flow divides into three broad phases. These reflect trends in the discourse content rather than rigid delineations.

Phase1 runs to the approximate midpoint of the workshop. It broadly focused on environmental factors outside the organisation. Phase 2, spanning the midpoint from turns 84/85 up to 118/119, represents a transition phase. Phase 3 focused on internal issues and potential action. Phase 2, as illustrated in Exhibits 3 and 4 below, marks a shift from external factors to an internal focus on actions the organisation can take to improve their adult education provision.

In Exhibit 3, DT raised the possibility of internal action, and the two subsequent questions have the effect of challenging the group to make concrete suggestions about changes to be made in response to external factors over which the organisation has no control.

83	DT	No, we're not meeting the needs, ... ah, issue there, so who's going to do it and how are they going to do it, and who's going to fund it?
84	QE	Give us an example (DT), you see, when you say that, I don't get it? [(DT) ok]
85	OD	What do you want that we don't have at the moment? [(QE) Yea, give us an example?]

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:37:46

Exhibit 3

QE's simple use of 'Yea' in turn 85 has a tonal quality suggesting a need to get on with the job of making the rhetoric from the first phase more locally and contextually specific.

In the facilitator's summary at Turn 106 (Exhibit 4) the word 'actually' carries a judgemental implication that the discussion from the first phase was fine, but beyond the group's ability to do anything about it. It may further imply that they would be better served focusing on internal matters that they could 'actually' influence.

| 106 | DM: | I've been just catching some of the internal things that you might be able to actually do something about |

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:49:45

Exhibit 4

The same participants, who posed the questions that ended Phase 1, also pose challenging questions in Exhibit 5 which steer the discussion into Phase 3 – the search for actions that can be taken.

118	OD:	Why haven't we done all those things already, we knew what they were, none of us, we didn't, haven't heard anything here we hadn't heard already?
119	QE:	are we subconsciously as an organisation actually reinforcing the status quo? [(ML) of course] or is our language in our publications and our opening and everything else, are we doing something?

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:57:04

Exhibit 5

OD leads in turn 118 with a provocative and somewhat dismissive challenge to the group through his expression 'haven't heard anything here we hadn't heard already'. QE's more self-reflective supplementary question raises a number of points that seeded the last phase of the workshop.

Phase 3, from turn 119, is internally focused on what the organisation needs to do to support adult education in the face of the recession.

The style of questions that prompt the shift from Phase 1, through Phase 2 and into Phase 3 are self-reflective and challenging. They provoke the group to address them by shifting their thinking and discourse towards a more tangible output.

4.3.3 Using Metaphors

The use of metaphors in the workshop discourse was analysed to understand how it impacted on the participants' roles or dialogue. While some insight was gained and a pattern of metaphor use was clearly evident, there was no demonstrable impact on either participant roles or dialogue. Consequently, the analysis of metaphor use is recorded in Appendix G for reference.

4.3.4 Constructing Identities

The construction of organisation and personal identities was examined in detail but found to have no appreciable impact on the participant roles or dialogue in the workshop. The detailed analysis is in Appendix H.

4.4   CONSTRUCTING WORKSHOP OUTPUTS

4.4.1 Introduction

As workshop outputs, the group prioritised the following issues for future consideration (see Appendix E - Workshop output):

- Improve self-awareness of their frames of reference and attitudes towards adult education.
- Change the vocabulary (life-long learning, continuing education etc) associated with adult education.
- Consider how presenting adult education may reinforce its stereo type image.

Arising from these three priorities the group agreed three follow-on actions:

- 1. Seek a new vision for adult education
- 2.   Raise adult education during programmatic and organisational reviews.
- 3. Discuss adult education in the context of any structural changes arising from the Hunt report on Higher Education in Ireland.

This section examines how the group constructed their conclusions and decisions through their discourse.

Initially, the implicit justification for formulating a new vision for adult education is examined. The effect of wider society's perception of adult education and how it creates an imperative for a new vision on adult education is then considered. Finally the need to improve awareness of the frames of reference through which the organisation views adult education is reviewed.

4.4.2 Discursive Drivers for a New Vision for Adult Education.

DT has general responsibility for managing adult education development in the organisation. From his earliest contributions (Exhibit 6), he alluded to a need to review the organisation's vision for adult education.

DT sees changing perceptions of adult education as a positive development (turn 7), and is confident of taking advantage of opportunities arising from the changing circumstances in the current recession. He reinforces this in Turn 9, qualifying it with the adjective 'accelerating'.

7	DT: but there's a number of things that have changed in relation to the background that I think are very, type of real opportunities
9	DT: the organisation is flexible and is able to work through that to the advantage, so that's sort of, that's beginning to change and we can see it, I think its accelerating in that change.
11	DT: I think that agenda is beginning to sort of change,
11	DT (at the end of the turn): now the question is to me in terms of the role of higher education are we going to be leaders or followers?

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 6

This suggests a sense of urgency, to avoid being left behind by the change. Turn 11 reinforces his view again, implying the opportunity for change should be grasped now and concluding with a direct challenge to the group through his rhetorical question at the end of Turn 11.

This was also made explicit in the latter part of the workshop (Exhibit 7).

150	DT: If people had a vision for, ya know, higher education any learner out there should be able to go to some documentation on line I want to do a course in X, right,
214	DT: ..ok let's say that one thing that will emerge from that group is a new vision for adult education or how adult education will fit in to this new vision

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 7

QE supports DT's perspective in Exhibit 8, both early and late in the workshop, through the use of language embracing change and the potential opportunities for the organisation.

14	QE: but whether it falls as a mashed and integrated to the extent that we'd like I don't know. I just know it'll be different , because everything is on the table now.
172	QE: because things are being spoken of the way they are there's a real opportunity now
175	QE: the fact that we're in a period of incredible change if we're alert there could be opportunities there

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 8

QE's suggestion that 'everything is on the table' (Turn 14), reinforces DT's earlier proposition that it is time for change. Towards the end of the workshop (turns 172 and 175,) QE's use of expressions like 'there's a real opportunity for change' and 'there could be opportunities there', are similar in language to DT's from the start of the workshop (Exhibit 6). By highlighting the opportunities for change due to the recession, they implicitly argue for the need to change.

DT also supports his case for change by citing personal experience

35	DT: how as a student, you know it's ah, you're short changed, ya know so ah like that sort of regime, and that mindset just has to change.
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:22:03	

Exhibit 9

Making his case more explicit in Turn 35 (Exhibit 9), the word 'regime' denotes an organisational approach which he considers undesirable. While the regimes he refers to are other organisations he attended as an adult learner, it is implicitly clear that his current organisation should not become such a 'regime'. This again sign posts a change in strategic vision on adult education.

OD highlights their own organisation's complicity (Turn 110 Exhibit 10), a view readily accepted by DT in his interruption. This exchange adds to the implicit rationalisation of the need for a change of vision on adult education.

109	DT: this is the other thing, a lot of these part time, I've done an MBS in (HE organisation), it's educational fraud, what's being practiced,
110	OD: We're doing that here in this college as well (DT) so [(DT) I know, it's being done all over the system… laughter]
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:22:03	

Exhibit 10

The combination of language outlined above builds an irrefutable case to create a new vision for adult education and explains why it was accepted with apparent ease as a specific follow-on action from the workshop.

It is interesting to note that only two of the four participants (DT and QE) make the implicit case for re-visioning of adult education in this way. While

there is no contrary view or opposition put forward by ML and OD, they implicitly endorse change in other ways.

4.4.3   Shifting Societal Mindsets.

The participants identify two distinct mindsets towards adult education:

- Irish attitudes to adult education.
- Internal organisational attitudes and mindsets.

This section will show how these characterisations contribute to the final conclusions and decisions taken by the Executive.

ML links these elements in the workshop's first turn (Exhibit 11 below).

Using the word 'grapple' conveys a sense of struggle with providing adult education. The phrase 'always escape us' has an absolute quality and may implicitly accept the need for radical change, if the organisation is to get to grips with the problem in the future.

4	ML: Well I think for me in the ten years I've been at *Our Organisation* adult education and our approach to it has always been up for discussion. We've, I don't think there's been a meeting where we haven't at some stage or other grappled with continuing education, part time students, adult education and with all the best will in the world we've, it seems to always escape us to pull it together.
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:05:46	

Exhibit 11

In Exhibit 12 below, ML shows an emotional attachment to adult learners through phrases such as 'first opportunity', 'the only opportunity' and 'make their way in the world'. Lamenting the failure of EU and national policy to support adult education, his acknowledgement that 'we mirror' these apparently failed policies provides a powerful self-reflective frame for the rest of the group's discussions. Again, this provides implicit acceptance by ML of the need for a change of vision to avoid future policy failures.

> | 4 | ML (latter part of the turn): Whereas the original intent of lifelong learning was the other way around - it was giving people the first opportunity, the first leg up the ladder but it just never got traction, it never happened, it was never supported, it was never funded, it was always hit and miss. But the strategy changed ......
> | | national policy's been controlled largely by EU policy and my own aspirations may have been for the adult learners ye know it's the only opportunity adults have of making their way in the world, has been downgraded at EU level and that's been replicated at national level. And that I think for me gives some understanding, I mean we mirror what happens then based on those policy decisions to some extent.
>
> Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:05:46

Exhibit 12

ML and OD's later exchange (Exhibit 13 below) on Government policy shows OD's disposition to change.

> | 24 | ML: and I, it suddenly dawned on me, it's not, I used to believe everywhere was the same but it's not. There's something inherently in the culture that doesn't value adults going back to education.
> | 25 | OD: Government policy is supporting that. Department of Education has three fundamental sections: primary, secondary and tertiary. Enterprise Trade and employment has a whole bunch so it becomes a Government policy thing to go to education and training for example to bring all that together, to move your mind set and that hasn't happened yet but it might happen
>
> Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:20:23

Exhibit 13

OD credits Government policy with trying to overcome negative cultural attitudes and to bring about a shift in mind sets on that topic. Ending the turn with 'but it might happen' suggests a personal desire that it would happen and illustrates a positive personal disposition to see change in mindsets towards adult education, which is one of the workshop outputs.

ML's key point on the negative national disposition towards adult education is repeated a number of times by other participants during the workshop (see Exhibit 14 below).

22	ML: and to me there's something in the Irish psyche about adults and education. There's something that sits uncomfortably in the Irish psyche about an auld fella goin' back to education, it just doesn't seem right,
73	QE: the eighteen year old going to college, god, aren't you great, and then the adult going back to college, jesus you're great but
75	QE: So we haven't really, there's almost a, is it a begrudgery of it, I don't know, but there's a sting in the tail about it that isn't there if you're 18 years old and I often thought
95	DT: and there's a kind of another Irish thing you should be glad you have it

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 14

ML's expression 'auld fella' in Turn 22 has a negative connotation in Ireland, conveying a sense of someone being beyond use or benefit. It is used pejoratively here, projecting the negative connotation on a younger generation, when applied to adult education. This is ML's representation of Irish societal attitudes towards adult education, which is supported by QE and DT.

QE uses a softer tone (turn 73) but makes a similar observation - while Irish people might applaud an older person going back to pursue adult education, the 'but' clause is emphasised and unfinished, leaving it laden with the implied meaning of 'what good is that going to be to anyone'.

DT reflects a third Irish attitudinal perspective (turn 95), making QE's 'begrudgery' remark (turn 75) more explicit.

This sequence of turns represents a negative societal attitude towards adult education, explaining in part the need for a new organisation vision to contribute to a change of attitude in society.

4.4.4 Internal Organisational Attitudes

Internal attitudes towards adult education are more diverse and dispersed throughout the workshop discourse. An early passage of turns (26 to 34) highlights conflicted thinking on representing adult education as a financial problem (Exhibit 15).

26	ML:	But I think it is changing and I think the testament to *Our Organisation* is we've never, we've never let it go [
27	QE:	we haven't let it go].
28	ML:	And part of it is down to (DT) and his persistence and ensuring that it's there, but we haven't let it go.
29	DM:	Why? If it's the resource drain that (QE) talks and (OD) talks about
30	OD:	It's the additional revenue stream that we absolutely need [
31	ML:	I think it's deeper than that, DT.
32	DT:	ah no it's much deeper than that.
33	ML:	we believe, it is deeper than that).
34	QE:	It is something about those but it's, we're pushing it here, something about our mission, that we're pushing it but we're not bringing the wave of the organisation with it, until we got as far as start over. Start over was the first time I saw the whole organisation coming behind.

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:20:47

Exhibit 15

OD's use of the word 'absolutely' (turn 30) shows no equivocation on the importance of adult education as a source of revenue. However, while not denying OD's assertion, ML's response that 'it's deeper than that' is strongly backed up by DT's qualifying 'much', leaving other factors to be considered.

QE's expression 'we're pushing it here' (turn 34), followed by the self-critical 'but we're not bringing the wave or the organisation with it' challenges the group to explore more deeply the internal disposition towards adult education.

OD continues to represent adult education as a resources problem (Exhibit 16 below), referring in several turns to the quantum of work and effort that adult education requires, relative to CAO students.

OD is clearly uneasy about the resources required to sustain adult education. An implicit question seems to be: 'Is adult education really worth it?' The finality of his comment at the end of Turn 17 judges the current model of adult education to be unsustainable.

15	OD:	is mind numbing in terms of the energy and then you have to repeat it and repeat it and repeat it, there's no sustainability to that effort, whereas in the CAO you get this momentum built up, courses are recognised and just happen each year
17	OD:	going back over and over again, so the energy investment is consistent, repeated and substantial, to get an educational impact through the adult learner cohort of staff. you crunch the numbers you actually can't do that.
59	OD:	I don't see it that way at all, I just see it as a different sort of, source of business but what I am saying is, that the consistent repeated energy to keep that wheel turning is greater than the CAO,
61	OD:	the creator creates but there is nobody sustaining it and the sustenance has to come from within and we've to keep pushing it

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes)

Exhibit 16

DT supports the resource representation in Exhibit 17 below.

35	DT:	but we're not going there again trying to run this on a shoe string. I mean that's, .

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:20:47

Exhibit 17

Posed this early in the workshop, their vehemence implies a need to change the model underpinning adult education provision. This is supported by ML in an exchange from Turns 39 to 43 (Exhibit 18 below).

39	DM:	And we're not, we're not getting them yet?
40	ML:	Not yet but a good example recently was (external company name) - [(DT) yes, yea] that crystalised a lot of what *Our Organisation* can do that others just can't.
41	DT:	Which was a totally contrived excuse,[
42	QE:	yea, but we still have the memory of going to college …and that's motivating us]
43	ML:	Yea, there certainly is a driver there that's, that, it's, somethin about the values and beliefs that, that a large majority of *Our Organisation* staff adhere to, and I think if you went back and asked people what attracted them to *Our Organisation*, a lot of them, there is somethin about the mission, there is somethin about doin somethin different and that every now and again comes to the fore when it's, I think, [(QE) yea, it's there]

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:26:59

Exhibit 18

Praising the organisation's support for redundant workers (turn 40), ML then represents adult education as a common set of values or beliefs which attracted employees to the organisation. Invoking core values and beliefs early on requires the group to review the adult education vision, if those values or beliefs are found wanting in any way.

While QE's observation about the 'Start over' programme (Turn 34 Exhibit 15) supports ML's praise for the organisation, it also suggests that in the past (i.e. prior to this "first time"), there was a mismatch between staff views and the organisation's general direction on adult education. This interpretation of their exchange suggests implicit support for a new vision on adult education.

OD also represents adult education as a challenge to the organisation to meet students' needs (Exhibits 19 and 20 below).

37	OD: So did what we provide meet the needs of the learners? And some of them would say yes and some of them would say no. And then the type case (DT) was making about being short changed on the supports and all that would suggest that some of them need supports that we're not providing.
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:21:05	

Exhibit 19

The question in turn 37 is rhetorical, as he went on in the turn to develop his case about the energy required to sustain adult education. However, in Turn 82 (Exhibit 20), the same question is repeated twice and left unanswered.

82	OD: So are we swimming against a tide or are we accommo, or are we actually facilitating the needs of the adult learner. .... So if we are meeting their needs with the provision we put on, at whatever volume or scale or frequency, then we must be doing something right, if we meet their needs. The question I have is, are we meeting the needs?
83	DT: No, we're not meeting the needs, and this is the point going back to the, there's an economic need, there's a social need, there's an educational need out there that the higher education sector is not meeting.
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:37:46	

Exhibit 20

The nature of this question has a particular implication if answered in the negative, as it was by DT in Turn 83. The implicit question that logically arises from DT's answer must be 'So what are we going to do about it?'

This passage of discourse inevitably leads to a need to redefine the organisations concept of adult education. As mentioned previously in the discourse overview section, the second half of the workshop was oriented towards finding answers to some of these challenging questions.

4.4.5 Comment on Workshop outputs.

Contrary to the intent in the workshop agenda, the discourse in the first part of the workshop did not <u>explicitly</u> identify the topics that the group felt needed to be solved in the second part. The analysis identifies issues <u>implicit</u> in their discourse which need to be addressed in the future. Their decision to seek a new vision for adult education is not insignificant and would likely result in a considerable amount of further work and discussion, but it is consistent with the implications of their discourse throughout the workshop.

4.5   DISCOVERING PARTICIPANT ROLES

4.5.1 Introduction

The workshop participants represent adult education problems from different perspectives and in different ways, some of which was evident in the previous section.

Initial analysis of the workshop recording indicated a pattern of themes being raised by individuals. This in part defined '**what**' strategy they talked about. Subsequent analysis led to a pattern of participant roles becoming evident, which defined '**how**' they talked about and constructed their strategy.

The roles are my interpretation of participant's different approaches to engaging in the workshop. They are uniquely defined in the context of this workshop and viewed collectively, enable a coherent and holistic exploration of their topic from disparate perspectives.

This section explores how participants' distinct roles are defined through their discourse.   It shows how their representations of adult education are constructed and how they are linked to role definitions for each participant.

The analysis shows how collectively, the participant roles were one of two workshop features that enabled a balanced conclusion to emerge from the disparate themes they individually raised.   (The second workshop feature, dialogic discourse, is explored in detail in Section 4.6 of this chapter).

4.5.2 OD - A Devil's Advocate Quantifier

OD could be identified as 'a devil's advocate quantifier'. This section shows how OD proposes, challenges or refutes ideas and arguments, with a view to teasing out their implications, rather than from a defensive or possessive perspective.   He brings a more robust quantitative, combative and self-challenging flavour to the discussion. In broad terms, he draws attention to the organisation's engagement in the adult education sphere through referencing statistics, finance matters and student numbers.

> | 5 | OD: I would generally come at this from sources of students and students comin' into the college which is the fodder that we work off and through the CAO system |
>
> Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes)

Exhibit 21

His early characterisation of students as 'fodder' (Exhibit 21 above) is somewhat unconventional and indicative of seeing them as a 'raw material' to be used in 'the education business'.

The language used in OD's turns in Exhibit 22 is strongly reminiscent of 'accountant speak'.

> | 15 | OD: To get three hundred and somethin FTEs through the continuing ed adult learner, smaller lumps of learning and market all that course is mind numbing in terms of the energy |
> | 17 | OD: and when you crunch the numbers you actually can't do that |
> | 21 | OD: It's the additional revenue stream that we absolutely need |
> | 37 | OD: if we are continuing to afford the continuing the energy investment, and it is a huge energy investment, |
> | 69 | OD: he who can apply through the CAO and not pay fees and get funded by the HEA, he who has to write a cheque to us to get inside the door, they're the rules of the game |
>
> Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes)

Exhibit 22

Expressions like 'crunch the numbers', 'additional revenue', 'huge energy investment' and 'rules of the game' reflect a focus on the cost of providing adult education. (Note – it is known OD is **not** the organisations accountant).

Of particular note is his reference in turns 15, 17, and 37 to the quantum of 'energy' required to sustain support for adult education. One might argue that there is a subliminal question in the background - Is it worth it?

It may also be viewed as a pragmatic reality check that any idealistic thoughts about adult education have to be supported by using hard earned and often scarce resources.

In later turns (Exhibit 23) he uses quantitative arguments more explicitly to make his points. (Note: some of the specific numbers have been blanked to preserve the identity of the organisation on the named lists)

98	OD: We also need to keep this conversation in perspective though, that we're not doing too bad at the moment, that there's 38000 new entrants into full time education in 2008, 4,500 are what we call mature adults, that's 12%, we've XX%, we're ranked (high place) out of the 26 colleges at the moment in CAO,
100	OD: Well, who's number 24 our of 26 [(ML) On the same day] for matures, UCD, who's 25 and 26 on a whole rank of them, TCD.
102	OD: Well, I could find them here if I could look ... ya know they're there, [(ML) yea, but they're well down the ranking] that's making this stuff visible but it's also saying that the demand is of the order of 12% ..given the [pitch the way it is
186	OD: This conversation has just cost the state a thousand euro - what have we got that we can bring forward from this conversation? That we didn't have at the start of it.
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes)	

Exhibit 23

In turn 98 OD's statement "We also need to keep this conversation in perspective" belies a level of frustration and perhaps concern that at the half way point (time mark 00:48:44), the discussion is in danger of becoming too esoteric and not grounded enough in what he considers day to day realities. This sense of frustration is further exemplified in turn 118 (Exhibit 24) and he presses home his point in turn 127 with a statement about everyday realities.

118	OD: Why haven't we done all those things already, we knew what they were, none of us, we didn't, haven't heard anything here we hadn't heard already
127	OD: We're still caught in the realities of the day job which is what we have to deal with everyday
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:59:07	

Exhibit 24

While his tendency for numerically based argument is distributed throughout the workshop, he also demonstrates genuine concern for their students. Adopting a devil's advocate style of questioning, Exhibit 25 below illustrates how he champions their cause and challenges if the organisation is really meeting their needs.

37	OD	The answer to that I'll come back to, whether we met the needs of the learners or not. So did what we provide meet the needs of the learners?
82	OD	So are we swimming against a tide or are we accommo, or are we actually facilitating the needs of the adult learner. At the end of the day, there's no point in us putting on provision that the adult learner doesn't need or want. So if we are meeting their needs with the provision we put on, at whatever volume or scale or frequency, then .. we must be doing something right, if we meet their needs. The question I have is, are we meeting the needs?
107	OD	But look at what we have control over … within, withi, what I'm saying meeting the needs of learners, they're the guys that are on the site, ... So are we meeting the needs of the learners that present .. [(DM) - that actually show up, yea, ok] and are we flexible enough to accommodate offering them positions in the first place? Do we offer opportunities for them to come in? And we've lots of opportunities.

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes),

Exhibit 25

Overall, OD's prolific use of numbers to advance his argument and his willingness to be devil's advocate for others' contributions without being protective of his own arguments supports defining his role as a 'devils advocate quantifier'.

4.5.3 DT – Strategic Environmental Scanner

HE organisations frequently use structured strategic planning processes that reflect a strong bias towards the rational approach to strategy (Hart 1992; ESTIP 2008) and reflect the Design, Planning and Positioning Schools of strategy development (Mintzberg and Lampell 1999). Environmental scanning is a recognised practice in these approaches to strategy formation. It requires a detailed analysis and understanding of the micro industry and macroeconomic environment in which the organisation operates (ESTIP 2008, p.46).

DT's contributions focus on the wider educational system, society's attitudes towards the system and the economic drivers that shape the system.

Exhibit 26 below (turn 7) illustrates how he characterises 'the system' as something external that creates conflicting demands for his organisation.

6	DM:	and I can't remember the exact word you used, but you said something like we still haven't kind of, fully gotten to grips with it yet.
7	DT:	Nor has the system. And because, partly the, (OD's) right, the system because it's getting conflicting demands constantly, in terms of, so ah upskilling versus ah access so you've this equity versus excellence ah, technology versus sort of social sort of objective economic versus like this is constant sort of see saw between objectives and

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 26

In turns 7 (Exhibit 26) and 11, 89 and133 (Exhibit 27), 'the system' may be inferred to mean higher education generally.

11	DT:	so the whole point is that in relation to adult education, if we're talking about an education system, to use (ML)'s term of universal design, an education system that is generally accessible to a much broader group of parents. ......
62	DT:	Yes, but the reason that is (OD), it's an artificial segmentation that's been imposed on the system[
89	DT:	this is the politics of it, the higher education establishment is dominated by universities who have no shortage of students coming in for,
133	DT:	but what we're saying is, you should be able to offer that to anybody who wants it, that's really what we're saying, right, now within economic reason and that ya know but I mean, that's essentially what you're saying and we know that the present structures and systems militate against that.

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 27

Turn 62 however, has a subtle but significant nuance when he says 'imposed **on** the system' as opposed to imposed **by** the system (author's emphasis). This suggests he now identifies in part with 'the system'.

Exhibit 28 below shows an exchange around turn 62 that clarifies <u>one</u> meaning of 'the system'. The whole group engaged in this exchange (including the facilitator - DM) to establish that Government policy, in the form of 'rules of engagement', is one representation of 'the system' through which they must provide adult education.

61	OD:	so the creators create the COA courses and the system sustains it, whereas with the other types of programmes, the creator creates but there is nobody sustaining it and the sustenance has to come from within and we've to keep pushing it
62	DT:	Yes, but the reason that is (OD), it's an artificial segmentation that's been imposed on the system[
63	QE:	yea]
64	DT:	that's the point
65	DM:	By whom, (DT)? Who [
66	DT:	] By the rules of the (unintelligible)[
67	ML:	by government policy]
68	DM:	Ok, it's government policy?
69	OD:	It's the rules of engagement -
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes) starting at time mark 00:31:15.		

Exhibit 28

DT also fulfils the 'environmental scanner' role by periodically representing adult education from an economics perspective. Exhibit 29 illustrates this.

9	DT:	Ah, the second thing that's changing is the whole economic thinking that backs this sort of knowledge intensive and utilitarian sort of approach to education.
11	DT:	but I think, you know, particularly with the sort of restructuring in higher education and a review of economic ahh sort of policies and rethink in terms of economic policy of developing,
19	DT:	Well that's going to change the economics of it because fees are coming back,
83	DT:	No, we're not meeting the needs, and this is the point going back to the, there's an economic need, there's a social need, there's an educational need out there that the higher education sector is not meeting.
133	DT:	, but what we're saying is, you should be able to offer that to anybody who wants it, that's really what we're saying, right, now within economic reason and that ya know but I mean,
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).		

Exhibit 29

By referencing a spectrum of factors from changes in economic thinking (turn 9), to the needs adult education must meet (turn 83), to the economics of providing adult education (turns 19 and133), he raises economic environmental factors for consideration.

> | 106 | DM: | , and as the conversation has been going i've been just catching some of the internal things that you might be able to actually do something about, as opposed to you can't change Government policy cause we're too small, however some of the things that I think I'm hearing that may be influencable in here , eh... |
> | 107 | OD: | But look at what we have control over … |
>
> Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 30

While DT highlights important environmental and contextual factors, the workshop facilitator (DM), in turn 106 (Exhibit 30 above), focuses attention on factors that are within the group's capacity to influence or change. This is picked up immediately in turn 107 by OD, after which DT's focus generally but not exclusively moves away from external, environmental factors to internal strategic thinking, examples of which are illustrated in Exhibit 31 below.

> | 109 | DT: | But what's the strategic objective, if we had, to go on to a key strategic issue, right, what's happening at the moment is the other big elephant in the room is now we're talking about some restructuring of higher education |
> | 142 | DT: | But if you were to ask me the key strategic issue, ya know, in terms of adult education, it's almost to make the term, certainly the one word, ah, phrase I'd make redundant is continuing education. Ya know, part time education, I'd like to see those ofted out of the vocabulary right and even the concept of adult education, I mean what's different about adult education, education is education is education, do ya know what I mean. |
> | 201 | DT: | Now, it's, I think the main strategic thing is, it's a selling job ya know or it's a whatever sort of term you want to use and but there are opportunities now to do that in some new entity that may emerge in terms of higher education |
>
> Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 31

In the context of his early emphasis on external factors, along with his later emphasis on internal strategic thinking about adult education, DT's role could be viewed as 'strategic environmental scanner'.

4.5.4 QE – Reflective Enquirer.

From Table 3 - Speaker Statistics in the overview section of this Chapter, QE used half the talk time of ML, OD and DM and one third of DT's talk time. However, arguably he had the greatest influence on the workshop outcome. This begs the question - how was that time used to such influential effect?

In counterpoint to DT's external focus in the last section, QE's contributions have a strong internal focus.

Samra-Fredericks (2003, p.15) notes that conversation analytic studies have shown the personal pronouns "we" or "our" can be used in discourse to constitute an identity, task and setting within organisations. In contrast however, QE's frequent use of 'we' illustrates self-reflection and self-challenge (as an organisation) in respect of adult education, rather than generating personal or collective identity.

Exhibit 32 below shows QE using 'we' as a means of collective reflection.

18	QE: Yea, what's actually happening is we've achieved, more than achieved the CAO but we've pretty much stood still.
34	QE: we're pushing it here, something about our mission, that we're pushing it but we're not bringing the wave of the organisation with it, until we got as far as start over. Start over was the first time I saw the whole organisation coming behind.
165	QE: Ye see, I think it's different full-time part-time ya use it for something like that and how we present it and how we discuss it, ya see I think the language nearly defines the distinction and embeds it,
175	QE: But, yea, the fact that we're in a period of incredible change if we're alert there could be opportunities there, [(ML) yes, yes]

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 32

In contrast, Exhibit 33 below shows 'we' used in a more interrogative way. Each turn involves a pointed 'we' question, demanding a collective answer.

14	QE: And we can look at why that is, in this organisation the mind set of the greater part of the organisation is with that CAO thing.
119	QE: And I think one of the things, one of the things that struck me (ML), was are we subconsciously as an organisation actually reinforcing the status quo? [(ML) of course] or is our language in our publications and our opening and everything else, are we doing something?
134	QE: I think the question is really, why don't we do it
143	QE: Why don't we do that? [Why don't we

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 33

QE also uses 'we' to start an engagement (Exhibit 34 below) which culminates in a pointed question challenging the embedded and taken-for-granted practice of generating separate prospectuses for adult education and full-time programmes.

146	QE: No, but the fact that we had the two prospectuses, ya see the fact that we had the two if that's the action of us making the decision
147	DM: That's, that's creating a differentiation [that
148	OD: and that] is the CAO driver, one of those prospectuses is the CAO form of courses and the other is everything else.
149	QE: And why can't they both be the same? ….ya know, put them on the web, people will participate ….

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes) starting at time mark 1:03:35

Exhibit 34

QE doesn't restrict his reflective enquirer role to the group or the organisation. It is also explicitly applied to himself as in Exhibit 35 below.

131	QE I certainly have it very differently, I've gone through the education system and I was a teacher so I was part of the infrastructue and I didn't really get education at that level when I went to (college name) and I got it, not because of the lecturers but because of the process and I now I get it, now I see how liberating education is, ….

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes) starting at time mark 00:59:34

Exhibit 35

Towards the latter part of the workshop (Exhibits 34 and 36), QE's language shifts from self-reflection towards self-challenge.

134	QE:	I think the question is really, why don't we do it
143	QE:	Why don't we do that? [Why don't we
175	QE:	But, yea, the fact that we're in a period of incredible change if we're alert there could be opportunities there, [(ML) yes, yes]

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 36

This in turn contributes directly to the group's final decision (Exhibit 37), seeking a change to the organisation's mindset towards adult education and a review of their overall vision for adult education.

204	QE:	if we have this big ideological problem with parsing ourselves into part-time full- time prospectuses, we need to give some of the task of blurring those lines as an active action if we feel that's what we need to do to take the next step forward.
209	DT:	Ok, let's put it on that agenda for that group that I'm championing on adult education that one of the things, apart from the sort of operational things is that
210	QE:	Is about changing mindsets? [and that's a change
211	OD:	Yes] and that includes terminology [
212	QE:	Yea, it is, it's all
213	OD:	but if we don't follow through on that, we're all just going to go to lunch and we will stay
214	DT:	ok let's say that one thing that will emerge from that group is a new vision for adult education or how adult education will fit in to this new vision

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 37

This final set of turns was the culmination of the workshop and showed a specific action to review organisational mindsets towards adult education and to review the language used to define and characterise adult education. This was a natural conclusion for QE given the self-reflective and self-challenging nature of his contributions. It also shows an influence on the workshop outcome that's disproportionate to the amount of talk time claimed by QE in the workshop. From the preceding analysis, QE's role could be reasonably characterised as 'the reflective enquirer'.

4.5.5 ML – Philosophical Storyteller

While ML actively engages other participants throughout the workshop, his contributions could be characterised as 'philosophical storytelling'. He draws on both historical and contemporary personal experience to convey his views on adult education which displays a storytelling quality.

In their research of narrative and storytelling as a part of strategy making, Barry and Elmes (1997, p.430) state that 'narrative highlights the discursive, social nature of the strategy project, linking it more to cultural and historical contexts'. Cohen & Mallon (2001) found that 'stories are increasingly recognised as a powerful research tool, "open[ing] valuable windows into the emotional and symbolic lives of organizations" (Gabriel, 1998)'. Both points are well illustrated by ML's role in the workshop.

ML relays personal experiences, reinforced with reference to his own and others recent academic research, to support his opinions and perspectives.

In his first turn, heavily abbreviated below in Exhibit 38, lasting over two minutes, he sets the scene for the breadth of his perspectives.

4	**ML: Well I think for me in the ten years I've been at (org name) adult education and our approach to it has always been up for discussion. .... and with all the best will in the world we've, it seems to always escape us to pull it together.**
	And it's only recently that I got a lintiscent insight into that and it was someone who did an analysis of EU policy on lifelong learning and Ireland seemingly has seventy policies on life long learning. ....
	And the shift was, they defined two types of learners - high knowledge learners and low knowledge learners .....
	But the strategy changed to high knowledge learner when there were skills shortages .... suddenly for me I have a better understanding of how national policy's been controlled largely by EU policy
	and my own aspirations may have been for the adult learners ye know it's the only opportunity adults have of making their way in the world, has been down graded at EU level and that's been replicated at national level.
	Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes). starting at time mark 00:04:30

Exhibit 38

In this single turn, his succinct and engaging narrative style combines reflections on the organisation's history of adult learning, his own personal

understanding of adult education and how it has changed, and policy drivers at EU and national levels.

These various themes recur in a narrative style at different times in the workshop and strongly inform the overall reflective nature of the group's discourse. Of particular note is Turn 128 (Exhibit 39 below).

128	**ML: There's a great book by Jack Messereau, on education, and he says, the process of transforming your frames of reference begins with the process of self reflection**
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes). starting at time mark 00:59:07	

Exhibit 39

His anecdote about 'frames of reference' is discussed further by the group and is reflected in the written up notes of the workshop (see Appendix E).

In a short jocular exchange involving all participants (Exhibit 40 below), he alludes to his own story-telling approach in turn 124 with 'you're reproducing it with your vocabulary' and in turn 126 with 'I'm spreading the word':

124	**ML: Once, and the, once you're aware that's what's happening, then the change can happen. Once you're aware that you're part of the [(DT) the game, yea] the game and your efforts [(DT) know the rules, yea] you're reproducing it by your vocabulary, by how we respond to everything, when you actually can stand aside and say, jaysus, this is what's happening, then you start to bring the ..change..**
125	**OD: But what are you doing differently now that you've a PhD and you've had this realisation?**
126	**ML: I'm spreading the word .. (laughter) [(OD) How are ya goin] I'm encouraging others to think differently [(OD) it's ok (ML), you can get a ...laughter. and general banter about the microphone and recording]**
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes). starting at time mark 00:57:28	

Exhibit 40

Personal stories and experience combine with a philosophical outlook to show how storytelling permeates his numerous turns in Exhibit 41 below

22	ML: There's something that sits uncomfortably in the Irish psyche about an auld fella goin back to education, it just doesn't seem right, whereas if you go to other jurisdictions
24	ML: Frank McCourt talks about his days and night school in America has been there for generations, you go to Australia and they often, this story that I use, that in Buncranna.......I lived in another remote area in northern New South Wales, the town was Lismore and outside Lismore was a little hamlet called Buncranna and within, anybody that was born and reared in that Buncranna has a choice of 24 distance education providers specifically targeting adults
43	ML: and I think if you went back and asked people what attracted them to *Our Organisation*, a lot of them, there is somethin about the mission, there is somethin about doin somethin different and that every now and again comes to the fore
91	ML: and I know myself when I went back the value of the space as an adult was more valuable than the actual content that I was engaging with
105	ML: No but the only people who can influence the field are the people who are in it
113	ML: The other thing which I'm aware of is the academic community, eh, also bring with them a perspective on education that tends to be very discipline specific.
141	ML: And the other thing that's dawned on me over the years, too, and I see it here all over the campus, is how individuals do take a personal interest in the students

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 41

4.5.6 DM - Facilitator

Unlike the other workshop participants, DM's role was explicitly established prior to the workshop to 'facilitate the discussion and contribute an external perspective where appropriate' (see Appendix B).

As facilitator, DM used standard facilitatory techniques throughout - asking questions and providing periodic summaries. Analysis shows that the form of questions and summaries varied and had a material effect on the flow and direction of the conversation.

Questions. The facilitator's questions were of two types. The first are simple facilitative questions (Exhibit 42), bridging previous contributions or inviting participants to view a topic from another participant's perspective, examples of which are:

8	DM: To the advantage of *Our Organisation*, or to the disadvantage, or?
29	DM: Why? If it's the resource drain that (QE) talks and (OD) talks about
76	DM: So are we swimming against a cultural tide in trying to provide adult ed?
181	DM: where do you take this conversation?

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 42

These facilitative questions contrast sharply with the more provocative, challenging questions (Exhibit 43) which are more specific:

36	DM: So my question is, why would you want the next ten years to be any different?
90	DM: what's precluding *Our Organisation* from getting slightly radical in that sort of direction ?
132	DM: But are you effectively saying that as an organisation *Our Organisation*, is one of the key challenges or issues in *Our Organisation* to get *Our Organisation* as a collective to think that way, to shift it's frame of reference and if you can achieve that shift of frame of reference you have
156	DM: So does that mean that we're manufacturing the divide ourselves by the way in which we're publicising, we're inducting, we're recruiting, [we're promoting?
166	DM: we need to change the language and we need to change our collective mindset, and they become the kind of foundation, at least two foundations stones on which is the, well we won't change the next ten years unless we begin some kind of work collectively to try to shift those

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 43

These questions focus on actions that the organisation may take to address adult education challenges. Using 'we' in Turns 156 and 166 indicates a close identification with the group. However, given that the content is consistent with the group's discourse, they are not leading questions and do not seek to bring a personal or external influence to bear on the group's discussion.

Periodic summaries. Conventionally, facilitators periodically summarise a discussion and maintain a group's focus. In this workshop, the group's response to facilitation merits further analysis.

In the first summary (Turn 36) the reflective question posed to seed the follow on discussion wasn't addressed.

36	DM	so the generality of what I'm hearing says, ya know, it's not been a brilliant ten years but actually it's not been a bad ten years. So my question is, why would you want the next ten years to be any different?
37	OD	The answer to that I'll come back to, whether we met the needs of the learners or not. So did what we provide meet the needs of the learners?

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 44

The remaining four summaries (Exhibits 44 to 48) were interrupted before they were completed.

48	DM	But from, from what you're saying, if, if, can I just summarise some, some of the challenges, general challenges that, that I think I've heard, ... ya know where CAO is the core thinking driver, ah so that's that's one key point that I think
49	DT	Taking that, it's not the case of the fringe I think [(DM) ok] we don't have coherent concept of the adult learners in (organisation name), I think that's […

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 45

Participants picked up on individual topics in the summaries and continued the discussion on them, without hearing out the overall summary.

163	DM	it's it's education, we provide education and we said through the way we structure our offerings, promote our offerings, we actually create differentiation, but OD, you made the point that only
164	OD	But the HEA returns, what do they say? They don't say how [(DM) they don't differentiate] many educator, education impacts do you have …, they say, tell me, how many full-time students you have that you're going to draw down money for

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 46

There was no attempt to use the summaries as reflection points as might be expected or conventional.

106	DM	.. (OD) you, you opened the question and (ML), you felt yea I think we are but, but there seems to be an open question [(ML) no, I think that we're not] Oh, you'd reckon we're not, sorry, ok, I misunderstood that [(ML) not in the broader, not in the broader perspective] oh yea, ok,
107	OD	But look at what we have control over … within, withi, what I'm saying meeting the needs of learners, they're the guys that are on the site, not the lads that are off down here,
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).		

Exhibit 47

Some of the facilitator's summaries were treated as contributions and engaged as such by the other participants.

203	DM	There's only two specific next steps that you've identified so far, which is raise it through programmatic reviews and to redicsuss it in the context of the Hunt report or Hunt
204	OD	Well, ya see, I'm listening to what DT said there and I'm saying if we have this big idealogical problem with parsing oursleves into part-time full-time prospectuses,
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).		

Exhibit 48

Viewed as a pattern of interaction by the group, ML's observation towards the end of the workshop (Exhibit 49 below) may provide a clue for why this was happening.

177	ML:	And you see what's missing is, if (name) was here now he'd cut through all that talk in three minutes and tells us what we're [doing
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 01:11:00		

Exhibit 49

If the CEO habitually summarised the group's discussions, perhaps they were subconsciously resistant to anyone else adopting this aspect of the CEO's role, particularly an outsider. In this context, it is worth noting that OD is the first speaker after each summary, bar one. This pattern of interjections may indicate personal idiosyncrasies or perhaps is part of the personal leadership

identity he creates in the absence of the CEO (see Appendix H). While the facilitator was recapping on the discussion, perhaps the participants viewed it as a natural continuation of the discussion rather than a reflection point.

The end of ML's turn in Exhibit 49 highlights another contrast with the CEO's normal facilitative practice - the CEO "tells us what we're doing". The facilitator makes clear his role in this regard in Exhibit 50.

179	DM	Well, well that's going to be, that's going to be my next, I'm not going to tell you what we're going to be doing but my next job is to say...

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 01:11:03

Exhibit 50

This may also have been a catalyst for OD adopting the leadership identity just previously referred to.

On just one occasion, DM moved from a facilitatory to a participant role (Exhibit 51 below).

90	DM:	Can I just throw a thought on the table, based on exactly what you're saying (DT), that supposen there's a programme running here, that's half full, ok , ...that how we collect our fees is kindof our business, we've got ...... what's precluding (organisation name) from getting slightly radical in that sort of direction ?....
91	ML:	But, (DM) nothin's stoppin us [(DM) ok] and I mean (external company) that's a good example of it [(DM) right, ok]

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:35:17

Exhibit 51

While acting within his pre-workshop brief to 'contribute an external perspective where appropriate' (see Appendix B), he only engaged in this way on one occasion. In Turn 90 he displays what Samra-Fredericks (2003, p.156) calls 'mitigating linguistic features'. His suggestion is based on a preceding contribution and by using words like 'supposen', 'kindof', 'slightly radical' and 'sort of direction' all 'mitigate and thus avoid interpersonal collision'(ibid, p.156). This suggests a level of reticence or discomfort with a participant role as opposed to his predominant facilitative role in the workshop.

4.5.7 Comment on Roles

It is worth noting that the features characterising each participant's role occur throughout the workshop and are not confined to one or two turns. This shows an established pattern of discourse for each individual, running alongside the normal flow of conversation.

The roles as enacted allowed the topic of adult education to be explored and represented from many diverse perspectives. The adoption of roles by participants also appears to have avoided any interpersonal acrimony. The perspective from the roles could be readily accepted rather than being personalised to individuals.

4.6 DISCERNING A DIALOGIC DISCOURSE PATTERN

4.6.1 Introduction

Discussion is considered a form of conversation in which participants debate ideas, come to an agreed conclusion through analysis, or argue through a form of point-scoring exchanges (Bohm 1996, p.7; Senge 2006, p.230).

The workshop briefing note (Appendix B) and the agenda (Appendix C) initially positioned this workshop as a discussion, as defined by Senge (2006) and Bohm (1996). The workshop purpose was to prioritise issues of concern and define actions to resolve the issues.

Preliminary analysis of the workshop proceedings suggested that a different type of conversation was taking place from the discussion envisaged during the preparation. This section analyses the workshop transcript for evidence of a dialogic form of conversation.

Four dialogic indicators are used to guide the analysis: Topic Expansion and Reflexive Observation (Senge 2006), and Affirmation and Productive Difference (Gergen, Gergen and Barrett 2004). The concept of 'suspending assumptions' was reviewed in Section 2.6.6 along with the reasons for not explicitly using it as a dialogic indicator, but also how it related to three of the indicators that are used in the analysis.

This section initially describes the result of preliminary analysis carried out using thirteen indicators.

This is followed by a review of 'Affirmation' between participants, how it is constructed and how it serves as a form of suspending assumptions.

Topic expansion is then scrutinised to see how it enables the group to consider a wide spectrum of factors related to their adult education topic.

Productive difference is then examined as a constructive means of dealing with different opinions within the group's discourse.

Finally Reflexive observation is shown to provide a way for the group to critically review their own treatment of adult education.

4.6.2 Preliminary Dialogic Analysis

The text was initially analysed using thirteen dialogic indicators derived from Senge (2006) and Gergen et al (2004). The initial results are shown in Table 4 below.

Occurrance of Dialogic Indicators			
Gergen et al (2004)		**Senge (2006)**	
	No of occurrances (in turns)		**No of occurrances**
Affirmation	42	Topic expansion	32
Productive difference	34	Reflexive observation	30
Coherence (answering)	20	Inquiry	22
Coherence (repeating)	5	Suspending assumptions	11
Repetitive sequences	0	Consensus (focusing down)	3
Coherence (Metonymic reflection)	0	Consensus (opening up)	1
		Reflection	0

Table 4 – Occurrence of Dialogic Indicators

Table 4 shows the number of turns in which each indicator was predominantly evident. The quantity of turns per indicator is not a sign of importance relative to other indicators (Wood and Kroger 2000, p.136). It simply reflects frequency of occurrence.

A second, more detailed analysis was then conducted to see how four indicators were in evidence through the use of language. Each indicator, along with the relevant analysis, is explained in more detail in the following sections.

4.6.3 Affirmation

Affirmation is a conversational act which confers significance, worth or value on someone else's utterance. It can be shown in a number of ways: through being attentive, curious, seeking clarification or being moved by a contribution. It does not mean assent but does signify engagement in the conversation (Gergen, Gergen and Barrett 2004). The first example of affirmation is taken from early in the workshop (Exhibit 52).

13	ML	It's funding, it comes down to funding at the end of the day [general agreements..]
15	OD	The fringe stuff is there to a large extent because it takes a huge amount more energy to recruit an adult learner in continuing ed 3 per FTE per year than it does through the CAO. If I get a hundred students in on a course through the CAO they're by and large there for four years job done, there's four hundred FTEs with a bit of loss three hundred somethin FTEs, bam, there you are. To get three hundred and somethin FTEs through the continuing ed adult learner, smaller lumps of learning and market all that course is mind numbing in terms of the energy and ...... The work based ones we have to keep [
16	QE	that's what ML said]
17	OD	going back over and over again, so the energy investment is consistent, repeated and substantial, to get an educational impact through the adult learner cohort of staff. When we started off with a strategic plan back about eight years ago we said we were going to get about half our students through continuing ed and half through the CAO, and when you crunch the numbers you actually can't do that.

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes)

Exhibit 52

QE's simple interjection in turn 16 provides affirmation of both ML's earlier contribution in turn 13 and OD's longer turn on the energy resource required for adult education. Noting that OD is not referring to funding as articulated by ML, QE's affirmation may be seen as 'careful or sympathetic attention' (Gergen, Gergen and Barrett 2004), and bridges the meaning between the two contributions.

Another example involves ML affirming OD after his contribution of statistics defending the track record of the organisation in adult education delivery (Exhibit 53). OD's sense of exasperation at the apparent failure to celebrate what the organisation has done is explicitly acknowledged and reinforced by the use of OD's first name in his reply.

98	**OD**	**the other initiatives direct entry initiatives and we're serving a substantially greater number than that so we need to celebrate what we're doing as well.**
99	**ML**	**[(DT) no, no but we are] But we do (OD) but no one else will take notice of that, the reality … [mixed voices and laughter]...**

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes)

Exhibit 53

Affirmation may also be shown through curiosity or question-asking as shown in the three way exchange in Exhibit 54.

122	**ML**	**QE, the purpose of higher education is to reproduce the societal norms that went before, that's been shown and all the studies that have been done, and no matter what you do, the fundamental purpose of Higher education is to ensure we don't upset the societal norms that are currently ..[(DM) - preserve the status quo?] ..yea, to ensure...[(DT) status quo ante or status crisis] laughter.......sorry it's not...**
123	**QE**	**Is there not an evolutionary dimension to that?**
124	**ML**	**Once, and the, once you're aware that's what's happening, then the change can happen. Once you're aware that you're part of the [(DT) the game, yea] the game and your efforts [(DT) know the rules, yea] you're reproducing it by your vocabulary, by how we respond to everything, when you actually can stand aside and say, jaysus, this is what's happening, then you start to bring the ..change..**
125	**OD**	**But what are you doing differently now that you've a PhD and you've had this realisation?**

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:57:28

Exhibit 54

The first question (turn 123) is somewhat rhetorical and shows QE mentally engaged with the point ML is making. The second question by OD (turn 125) affirms both what ML has just said, but also his recent personal achievement.

DT's subtle completion of ML's thought in turn 124 is also immediately affirmed by ML using the expression 'the game' from DT's over speak to continue his point. Implicit in the questions asked in Exhibit 54 above is an examination of (or suspending of) assumptions underlying the preceding statements by ML - the assumption in turn 123 that ML's expressed view can't just be a (valid) stand alone statement and the assumption that acquiring a PhD or that 'this realisation' was the basis for ML doing anything differently

A more explicit treatment of suspending assumptions is shown in Exhibit 55.

159	ML	But you also don't want to raise false expectations either because they still have to go through their channels [(DM) sure, yea], ya know, but that, the one example here where we did turn it on it's head was when we wanted .....
160	OD	No, except you start breaking rules, because we draw, ah, part-timers as we'll continue to call them for a minute into the full-time class room, and we're breaking the rules of the HEA ....
161	ML	No, but I know (OD), but if we don't put that out, and discuss it and try, it'll never, never shift, ...

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 01:04:49.

Exhibit 55

ML raises an example of 'turning something on its head' to which OD invokes HEA rules as a basis for compliance. ML's response is a call to hold up such rules (assumptions) to more critical examination to enable change in the adult education provision.

These examples illustrate how the participants show active listening and provide affirmative feedback, giving a sense of dialogic engagement in the conversation.

4.6.4 Topic Expansion

Thoughts can be viewed as a possession that people own and consequently seek to defend in conversation. A significant flaw in this approach is often the failure to distinguish between the process of thinking that generates thoughts from the thoughts themselves (Bohm 1996, p. 10). Consequently, the thinking (processes) underpinning a group's conversation can be incoherent as they come from multiple, non-aligned sources. This can result in divergent thought,

conflict, lack of understanding or absence of empathy (Senge 2006, pp225-226).

To bring coherence to a group's conversation therefore requires participants to 'become sensitive to all forms of incoherence' (Senge 2006, p.226). This requires a willing and proactive examination of all factors that contribute to individuals' and the group's perceptions of the topic under discussion.

The workshop group showed many examples of Topic Expansion which show how they actively construct the problem of adult education, taking as many factors into account as possible. This search for 'coherent thought' on the nature of the problem is a natural precursor to devising consensus-based solutions. Exhibit 56 illustrates an exchange that started with Turn 166 – the facilitator's summary of the preceding discussion - a view of adult education being founded on two different concepts (use of language and mindsets). DT then expanded the foundation to include values, norms and attitudes.

166	DM	but to wrestle with and succeed better than you've succeeded to date maybe those two key points, we need to change the language and we need to change our collective mindset, and they become the kind of foundation, at least two foundations stones on which is the, well we won't change the next ten years
167	DT	Well, yea, yea I think we're probably in a better place in terms of values, norms, mindsets, attitudes ya know ......
171	OD	Ok, well I would just qualify what you just there, (DM), is provided we don't in the process air brush out all the constraints that are being imposed upon us.
172	QE	But is it not like, because things are being spoken of the way they are there's a real opportunity now
173	ML	That's what the banking sector kept saying (OD), laughter, oh we can't change what we're doing ….
174	OD	Sean Fitzpatrick went off and he did all the things he did because he's such a creator .. The ultimate entrepreneur, where is he now? But he gave the two fingers to all the regulations that were there to control it..
175	QE	But, yea, the fact that we're in a period of incredible change if we're alert there could be opportunities there, [(ML) yes, yes]

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 01:08:10

Exhibit 56

OD calls for realistic constraints to be factored into the thinking process and QE sees opportunity arising from 'the way' things are being spoken of (Turns 172 and 174). ML's use of a simile from banking (turn 173) brings in a resistance to change perspective which OD counters, invoking the need for rules or else face the negative fate implied by his rhetorical question 'where is he now'. In this short passage of turns lasting just 2½ minutes, a wide spectrum of factors are raised relating to their adult education topic, illustrating the concept of topic expansion.

Exhibit 57 below illustrates how the group expanded their conceptualisation of adult education and the factors affecting it in the first half of the workshop.

11	DT	but I think, you know, particularly with the sort of restructuring in higher education and a review of economic ahh sort of policies and rethink in terms of economic policy of developing, like, in other words we're not totally in the human capital argument in relation to, which had dominated the 90's,
13	ML	It's funding, it comes down to funding at the end of the day [general agreements..]
21	OD	But that's a serial change, but the more recent labour activation stuff has been the first time the state is funnding ahh second education
22	ML	There's something that sits uncomfortably in the Irish psyche about an auld fella goin back to education, it just doesn't seem right, ….[laughter]
38	DT	I think the adult education, the way I've always seen it was ....ya know the same political sort a dynamics pushing against it ya know, especially not letting the Government dominate the educational philosophy...
70	QE	The other thing that happens with this, is they look at the whole bureaucracy, there's a, there's a kind a, the part-time education is more suitable to a private college that's from a business model, an entrepreneurial kind a model and we're in a bureaucracy - they do not sit well together.
82	OD	So are we swimming against a tide or are we accommo, or are we actually facilitating the needs of the adult learner. At the end of the day, there's no point in us putting on provision that the adult learner doesn't need or want.

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 57

Participants see it from many different perspectives - economics and politics (turns 11 and 38), a funding dimension (turns 13 and 21), the national psyche (turn 22), a public sector bureaucratic versus a private sector entrepreneurial business view (turn 70) and meeting basic student needs (turn 82).

Expanding the topic beyond adult students in the class room provides the basis for examination of the strategic factors affecting adult education and lays a more solid foundation for a coherent collective view of the problem and a range of approaches to solve it.

The reasoning process behind each of these views needs to be examined and tested, which also illustrates 'suspending assumptions' as an implicit part of topic expansion. The conversation can only be said to be dialogic if the topic expansion and suspension of assumptions take place together, as topic expansion alone would not ensure any greater depth of understanding.

Exhibit 58 shows one mechanism in this workshop which helped suspend assumptions - the facilitator's (DM) interventions.

29	DM	Why? If it's the resource drain that (QE) talks and (OD) talks about ….
36	DM	So my question is, why would you want the next ten years to be any different?
39	DM	And we're not, we're not getting them yet?
76	DM	So are we swimming against a cultural tide in trying to provide adult ed?…..
90	DM	what's precluding (organisation name) from getting slightly radical in that sort of direction ?….
147	DM	That's, that's creating a differentiation [that
156	DM	So does that mean that we're manufacturing the divide ourselves by the way in which we're publicising, we're inducting, we're recruiting, [we're promoting?…

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 58

The style of questions probe taken-for-granted positions or new proposals, enabling people's thinking to be expanded and tested further.

4.6.5 Productive Difference

Meaning is created in dialogue by the differences between contributions from participants. If there is no difference, the result is at best affirmation and at worst duplication. Productive Difference exists when a contribution sustains or extends a previous contribution. Contributions are destructive where they negate or curtail other utterances, in that 'they impede the process of constructing a mutually viable reality' (Gergen, Gergen and Barrett 2004).

Building on Topic Expansion, there are a number of examples of Productive Difference in the workshop discourse.

Exhibit 59 provides an example of a significant change to integrating students from part-time and full-time programmes (turn 159). The scale of the change is implied by the phrases 'we did turn it on its head' and 'suddenly there's a mindset shift'.

159	ML	But you also don't want to raise false expectations either because they still have to go through their channels [(DM) sure, yea], ya know, but that, the one example here where we did turn it on it's head was when we wanted is when we wanted to run third year computing and we told the students it's only available in the evening, [(multi) yea, yea] and that to me, suddenly there's a mind shift there.
160	OD	No, except you start breaking rules, because we draw, ah, part-timers as we'll continue to call them for a minute into the full-time class room, and we're breaking the rules of the HEA and we'll have to do manual adjustments and how many students we have to the HEA around the place ...
161	ML	No, but I know (OD), but if we don't put that out, and discuss it and try, it'll never, never shift, but I've been thinking that recently...

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 01:04:49

Exhibit 59

However, OD immediately tempers this (turn 160) by pointing out that it constituted 'breaking rules' and would require additional work to make 'manual adjustments' to HEA returns. Productive Difference arises in that OD doesn't fully sanction ML's initiative but also identifies the work around necessary to make it possible. ML affirms OD's concern with 'I know (OD)'

making the exchange productive and continues his broader point that they have to continue pushing to discuss and try new approaches to bring about new mind sets about adult education.

Exhibit 60 below provides another example of productive difference but with a different tonal quality.

133	DT	but what we're saying is, you should be able to offer that to anybody who wants it, that's really what we're saying, right, now within economic reason and that ya know but I mean, that's essentially what you're saying and we know that the present structures and systems militate against that.
134	QE	I think the question is really, why don't we do it..? I think that's really …
135	OD	But ya see, I think you're putting yourself down a bit there, because if (name) was here he'd be standing pounding the table at this stage saying we do all that, it's a full-time offer, it's a part time, it's an (external company), it's a …
136	ML	No, but you're right (OD), we do do it. I mean we're not suggesting that we don't do it, [(DT) we're not blind] but it's, the rules of the game aren't always, aren't set by us, and we've to get a sense of those, and we're very good, we're very good once we've a sense of them of playing on the margins and taking full advantage ..

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 01:00:35

Exhibit 60

DT and QE begin with a self-critical view of the organisation's structures and systems and how they hinder adult education delivery. OD defends the organisation, claiming credit for positive features which ML readily acknowledges. It's DT's over-peak comment 'we're not blind' in turn 136 that adds a tonal quality, suggesting that OD has missed the real point which is then made by ML - that the external system provides the constraints and the organisation is actually 'very good'. The initial difference leads to a clarification of meaning which everyone readily accepts.

Exhibit 61 below illustrates how a line of discussion is initially closed down but productive difference allows a more positive outcome.

ML's initial point is picked up by DT (turn 114) and becomes a jocular exchange between them over the next two turns, until DT declares their

exchange a 'total digression' (turn 116). However, the facilitator (DM) holds a different view, hearing 'key issues' in the exchange that could be discussed further. The difference in views between participants and facilitator went on to prompt a wider engagement about the frames of reference used by staff about adult education, which became a partial action point at the end of the workshop.

113	ML	The other thing which I'm aware of is the academic community, eh, also bring with them a perspective on education that tends to be very discipline specific. They adhere to their discipline. It's only later on that they start to broaden their perspective that their practice is education, an educator first and the responsibility to their discipline second, and that's often a core shift that's needed to allow us to embrace the diversity [
114	DT	Well the] cla, how this transforms in the classroom is ya know, the bar services, marketing lecturer arrives in ya know it's the same powerpoint presentation given to the other graduates this morning he just flicks through it twice as fast, right, we've jumped chapter one and chapter two of the book, and off we go
115	ML	in half the time....[laughter].. because you're an adult [laughter]...because you'll take this in faster, yea, so ya know [general laughter and talk]
116	DT	Anyway, that's a total digression …
117	DM	Not quite, cause, cause actually you, you've painted a whole host of key issues that need to be surfaced in the context of trying to grapple with the adult ed question,

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:55:10

Exhibit 61

4.6.6 Reflexive Observation

Senge (2006, p.161) identifies 'mental models' as the basis for how individuals and groups interpret their surroundings. Reflexive Observation as a dialogic indicator, is based on two concepts – self-review of how we view the world and a willingness to challenge that view when necessary. The capacity to test and develop these models requires a culture supportive of critical inquiry, infrastructure to support engagement with those models and personal

awareness and reflective skills (Senge 2006, p.171). The crucial mental models within an organisation are those shared by the key decision makers.

Mental models are not right or wrong, but can cause problems if they become implicit – i.e. 'when they exist below the level of our awareness' (ibid, p166).

There is a close relationship between suspending assumptions as described earlier and a willingness to review and challenge the mental models decision makers use to interpret and make sense of the world. Reflexive Observation is also an indirect means of assessing how the group suspend their assumptions during the workshop.

At a general level, one pattern of reflexive observation directly relates to how they perceive and characterise adult education. Exhibit 62 provides three examples.

11	DT	Now it's slow to happen ahm, now the question is to me in terms of the role of higher education are we going to be leaders or followers in terms of this, and that to me is the ….
34	QE	It is something about those but it's, we're pushing it here, something about our mission, that we're pushing it but we're not bringing the wave of the organisation with it,
98	OD	We also need to keep this conversation in perspective though, that we're not doing too bad at the moment, that there's 38000 new entrants into full time education in 2008, 4,500 are what we call mature adults, that's 12%, we've XX%, we're ranked (high place) out of the 26 colleges at the moment in CAO, ... so we need to celebrate what we're doing as well.

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 62

These examples show the diverse ways in which the group viewed their own contributions to adult education. DT and QE question where the organisation should be positioned and challenge themselves on how they might bring the organisation with them. OD's reflection is more defensive of work done to date and praises the organisation with relevant statistics.

There is a different kind of Reflexive Observation taking place as well. It could be characterised as meta-reflexive, in that some contributions openly question the mechanisms they use to reflect on adult education. Exhibit 63 illustrates how QE questions the organisation's mind-set very early in the

workshop (turn 14). Turn 119 shows his strong awareness of the diversity of 'mental models' available to the group to understand adult education and then identifies one aspect of the organisations activity that may negatively reinforce existing prejudices towards adult education.

14	QE	And we can look at why that is, in this organisation the mind set of the greater part of the organisation is with that CAO thing.
119	QE	No, but we're all in very different places, if you stand back and look at it. And I think one of the things, one of the things that struck me (ML), was are we subconsciously as an organisation actually reinforcing the status quo? [(ML) of course] or is our language in our publications and our opening and everything else, are we doing something?
210	QE	Is about changing mindsets? [and that's a change

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 63

Turn 210 indicates that QE was still wrestling with the mind-set question at the end of the workshop.

Exhibit 64 provides an explicit example of the groups 'frames of reference' being held up for scrutiny by ML.

124	ML	Once, and the, once you're aware that's what's happening, then the change can happen. Once you're aware that you're part of the [(DT) the game, yea] the game and your efforts [(DT) know the rules, yea] you're reproducing it by your vocabulary, by how we respond to everything, when you actually can stand aside and say, jaysus, this is what's happening, then you start to bring the ..change..
128	ML	There's a great book by Jack Messereau, on education, and he says, the process of transforming your frames of reference begins with the process of self reflection.[

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 64

ML initially raises the need for a deeper self-reflection in turn 124 using the phrase 'when you actually can stand aside'. His implicit challenge is backed up by a more academic treatment in turn 128, by invoking a writer on the specific topic of education and identifying the particular feature that needs to be reflected on - frames of reference.

4.6.7 Comment on Dialogue

By strict definition, this workshop was not a dialogue session. However, patterns uncovered in the discourse indicate a dialogic pattern when assessed against dialogic indicators derived from the literature.

The participant's dialogic approach enabled a wide range of perspectives on adult education to be explored, without a sense of possession or protection of the ideas under discussion. A willingness to 'suspend assumptions' and hold them up for examination and critique within the group's discourse, promoted a balanced review of their topic and resulted in the consensus based outcome to critically review the organisations vision for adult education.

4.7   CONCLUSION

This chapter opened with an overview of the wider context, both national and local, in which the workshop took place, reflecting Phillips and Hardy's (2002, p.5) proposition that 'we must also make reference to the social context in which the texts are found and the discourses are produced'.

The workshop's discourse was analysed from four main perspectives:

- Construction of workshop outputs.
- Definition of roles by the participants.
- Dialogic nature of the group's discourse.
- The use of metaphors and construction of collective and individual identities were also reviewed but had no significant impact on the workshop proceedings.

The need to re-formulate a vision for adult education was first raised explicitly at turn 214, 1½ minutes before the end of the workshop. The group reached that conclusion without having explicitly named it as a problem during the workshop. This provides the clearest evidence that realities can and are shaped and formed by the subtlety of the language used, as much as by any overt or explicit statements. Some ideas were conveyed implicitly, discernable through analysis of the discourse after the event, but which were sub-consciously identified by participants during the workshop discussion.

Examination of specific themes raised in the workshop enabled identification of roles enacted by each participant. The roles accommodated diverse perspectives to be presented and reviewed, leading to shared understanding of each other's themes rather than asserting defensive positions or ownership around those themes.

The dialogic pattern of the group's discourse allowed underlying and often unspoken assumptions to be surfaced and constructively challenged, to build common understanding of the strategic problem and potential solutions. The dialogic approach also avoided individual's positions being undermined.

The combination of the multiple perspectives arising from participant's roles and the dialogic nature of their discourse, results in acknowledged learning by participants and "opening up" consensus (Senge 2006, pp231) on the next steps to be taken.

The combination of roles and dialogue may also help to explain why the quantity of contribution wasn't an indicator for influencing the final outcome. The least prolific speaker, QE, had the greatest influence in challenging the current thinking on adult education and identifying the need to review mindsets and set a new vision for adult education in the organisation.

The use of metaphors showed little significant impact on the final outcome of the workshop. It played a role in steering the tone of the discourse for a certain period of time. In this context, war-like metaphor seemed to have a greater influence on the groups discourse with a short-lived but discernable pattern of escalation of metaphorical rhetoric (see Appendix G).

There was a clear sense of organisational identity building, through identification of the strengths and weakness of the organisation with respect to adult education. Participants kept self-praise, self-reflection and self-criticism in balance, without using excessively effusive or destructive language (see Appendix H for detailed analysis)

The absence of the group's leader provided an opportunity to discern how one individual subtly built a temporary identity to fulfil that role. This identity was constructed to achieve a substantive output from the workshop rather than as a play for CEO power or authority for its own sake. The individual built his identity using a blend of facilitative and consensus-building language. This contrasted with the more combative/ challenging language used when constructing his role as a 'Devils Advocate Quantifier' (see Appendix H for detailed analysis of identity).

Overall, the analysis shows that language can be infectious and subliminal. Individuals carry ideas and thoughts forward in the conversation without the same words necessarily being used by each other. The workshop's most telling language feature was identifying and agreeing the requirement for a new vision for adult education, without explicitly articulating that need until the last turns of the workshop. The language carried greater meaning than the specific words used, a meaning that was fully understood by the participants.

4.8   ANSWERING THE RESEARCH QUESTION.

How do discursive interactions in a facilitated strategy workshop define
and refine a strategy problem and associated response?

Three principal features explain how the discursive interactions in the
workshop defined and refined the strategic problem and associated response;

- Workshop structure
- Participant roles
- Dialogic discourse

The workshop self-organised into a three-phase structure, which was the first
contributor to defining and refining the strategic problem. The initial phase
considered a wide range of factors from both an environmental (external) and
internal perspective to define the problem. Refinement and resolution of the
problem came in the third phase, through focusing on local action that was
within the organisation's capacity. Phase two enabled a smooth transition from
problem definition to problem refinement and finally solution identification.

Within this structure, through a form of role playing, participants initially
represented adult education through a series of themes. Each participant
constructed and played a definable role, which was evidenced through their
language and discourse. By adopting these roles, the themes being raised were
depersonalised, which avoided any sense of possession or protection of ideas
by participants.   Themes were explored from multiple perspectives,
maintaining focus on the topic, rather than on the people or politics of the
situation, as can often happen in organisational discourse (Whittington 2006).

A dialogic discourse pattern was the third feature of the workshop which
defined how strategy developed. While not set up as a formal dialogue,
correlating the discourse with dialogic indicators showed how the participant's
roles interacted constructively.   The dialogic approach supported the
examination and challenge of ideas rather than people, and avoided
interpersonal friction.

The combination of workshop structures, roles and dialogue reflects Hendry and Seidl's (2003, p.191) assertion that 'If an episode is to have any value, it must develop some kind of structure of its own, and in particular a discursive structure within which the participants can communicate effectively'. In this case, the value arises from a particularly short strategy workshop producing a consensus-based output - the need to develop a new vision for adult education.

The implicit requirement for a new vision was implicitly represented from the beginning through the group's use of language but only became explicit through the combination of structure, roles and dialogue.

CHAPTER 5

CONCLUSIONS

5   CONCLUSIONS

5.1   INTRODUCTION

Motivated by curiosity about how organisations would prepare a strategy to deal with a deep recession, where no contingency provision had been made in existing strategic plans, this study sought to answer the following research question:

> How do discursive interactions in a facilitated strategy workshop define and refine a strategy problem and associated response?

The research question was answered in the previous chapter by pursuing four research objectives:

- To examine how participant's construction of roles informs the progress and outcome of their workshop.
- To examine how dialogue (versus discussion) helped the participants to build a consensus based understanding of and response to the strategic problem they faced.
- To examine the impact of metaphor in the workshop discourse.
- To examine how the participants defined identities through their discourse.

As a common and important process used to formulate strategy (Jarzabkowski and Spee 2009; Schwartz 2004a) the executive workshop was an appropriate vehicle to study strategy development.

As an under-researched and under-reported phenomenon (Hendry and Seidl 2003; Johnson, Prashantham and Floyd 2005; Hodgkinson et al 2006), this study contributes to a better understanding of both the dynamics and potential to improve strategy workshops.

This chapter draws conclusions from the research findings, identifies some of its limitations and considers the potential for further study arising from it. The Chapter concludes with a personal reflection on how the research may impact on my future work.

5.2   THE WORKSHOP AS A STRATEGY TOOL

The workshop agenda, structure and facilitation were geared towards a discussion based approach (Bohm 1996, p.7; Senge 2006, p.230).   However, the group demonstrated an intuitive tendency to interact in a dialogic way. The interaction of both approaches in this workshop reflects Senge's (2006, p.230) proposition that 'balancing dialogue and discussion' is the best way to generate group learning.   This suggests that focusing pre-workshop planning on achieving a balance between discussion and dialogue could improve the efficiency and benefits from strategy workshops. Participants would need to be made aware of the difference between discussion and dialogue, and up-skilling in a dialogic approach may be required for such benefits to be realised.

The research validates Wright's (2010) contention that 'consultants are strategists' in the context of workshop facilitation. The facilitator's influence was catalytic in that he provided the focus through which the dialogic exchange was distilled into an actionable outcome, but he had minimal input to the substantive content of the workshop or its outcome.   The facilitator's involvement may also have prevented the workshop becoming a 'talkfest', (Thomas Hardy and Sargent 2007), a concern that preoccupied one participant towards the end of the workshop. Workshop facilitators need to become more aware of the subtle differences between discussion and dialogue. Learning to harness the deep exploratory potential of dialogue and balance it with the output focus of the more familiar discussion format would enable greater input and productivity from workshop participants and minimise the need for consultants' input to the workshop's strategy content.

This workshop demonstrated a unique structure (Hendry and Seidl 2003) through the combination of roles (generating broad perspective), dialogue (enabling a full and constructive exploration of those perspectives) and focused facilitation (to produce an actionable output). Hendry and Seidl's proposed 'need for linguistic innovation within episodes if strategies are to be reflexively monitored and changed' (ibid.) was reflected in the combination of participant roles and group dialogue that naturally emerged, but without any of the manipulation, gamesmanship or personal aggrandising often evident in strategy

workshops (Thomas Hardy and Sargent 2007; Samra-Fredericks 2003; Schwartz 2004b). Workshop patrons and facilitators need to appreciate and embrace the self-organising potential of workshops, rather than seeking to impose too much structure from the outset. This would run counter to the natural inclination to want certainty of output before the event. Paradoxically, by seeking too much workshop structure in advance may preclude the evolution of the most productive outcome from the workshop event. It may also run counter to some managers and facilitators desire to manipulate workshops to deliver a predetermined out, which highlights a need to have greater transparency on the purpose of strategy workshops, before investing time and money in them.

The shared meaning achieved by the dialogic pattern of the workshop discourse counters Thomas, Hardy and Sargent's (2007) finding that there was 'little evidence of the workshop being an arena for the negotiation of shared meanings'. This workshop also had none of the personal agenda plays as reported by Samra-Fredericks (2003) or Schwartz (2004b). In this case, personal egos and agendas were subordinated to participant roles, enabling multi-perspective exploration of their strategic topic. Perhaps the preparatory or initial phases of strategy workshops need to address the possibility of personal or political grandstanding detracting from the more productive potential of the workshop. If the workshop moves in an unproductive direction, a dialogic approach would enable 'suspension' of and engagement with such negative trends. Moving to such an approach would need an investment by management teams in terms of time and money, to learn the necessary dialogue techniques and to build the trust and engagement culture required to realise the potential benefits.

The analytic effect of the roles and dialogue in the workshop discourse contrasts with Hodgkinson et al's (2006) survey finding that there is limited analysis in strategy workshops. Simple talk replaced structured analytic technique, but to equally incisive effect. Adult education was represented from many internal and external perspectives and the dialogic exchange accommodated deep analysis through challenging underlying assumptions and

thinking about the topic. Analysis doesn't only depend on tools or techniques, such as SWOT or PEST or other common analytical practices. Well structured interactions and talk in a workshop context can have the same and perhaps more profound impact, but would require management teams to shift from these existing rationalist approaches. Care would also be required to avoid workshops missing the need for clear analysis in the face of too much talk. Competent facilitation to ensure the correct balance between dialogue and discussion (Senge 2006) would address this concern.

In light of Hodgkinson et al's (2006, p.482) finding that 75% of strategy workshops last more than half a day, this workshop's eighty minutes duration had a very productive impact on strategy formation. Familiarity with the facilitator obviated the need for a ritualised workshop start (Johnson, Prashantham and Floyd 2005) and the combination of roles and dialogue enabled a thorough examination of the topic with the minimum use of time.

The combination of self-structure, roles and dialogue could be used as a template which other management teams or consultants could adapt and adopt to suit their own circumstances. Workshops could be held more frequently, but for significantly shorter duration. They could also be held in closer proximity to day to day operations and ultimately have more relevance and connections to the organisations normal activities.

5.3   DIALOGUE AS A STRATEGY TOOL

The literature suggests that dialogue sessions are carefully organised, structured and facilitated, with an explicit aim of achieving shared understanding between participants (Isaacs 1993; 1999; 2001; Bohm 1996; Innes and Booher 2000).   This workshop demonstrated that dialogue is achievable without being explicitly set up to do so.   The analysis established dialogue as one of two key ingredients in how this group constructed their strategy.

The roles identified in the workshop's discourse are the researcher's interpretation of how the participants interacted.   The evidence to support this interpretation is strong within this workshop, but not conclusive due to its dependence on analysis of a single event.

Adopting a dialogic approach created 'free discussion' (Jarzabkowski and Seidl 2008).   While the facilitator's periodic summaries provided some structure, there was no formal chair, no rules for turn taking and the conversation was self-organising with participants responding directly to each other (ibid, p.1404).   In terms of impact on strategy, the outcome was consistent with Jarzabkowski and Seidl's findings that 'free discussion' meetings tend towards a 'destabilising' effect on existing strategy.   In this case, the call for a new strategic vision for adult education 'destabilised' the existing strategy. However, this is only the first step in the process of changing the organisation strategy.   The broader management group requested to develop a new vision could still seek to preserve the status quo. Jarzabkowski and Seidl's Taxonomy of Meeting Structures (ibid, p.1414) suggests that such follow-on meetings would also need to be 'free discussion' if a new strategy is to evolve.   The findings of this research may provide a blue print for ensuring that such follow-on meetings are as productive as the Executive team's workshop, although adopting this approach could not assure any prescribed outcome.

Where the rationale for a change in vision was implicit in the Executive's discourse, making it explicit and therefore communicable to those outside the Executive's workshop, is no small task and will pose a significant follow-on challenge for the Executive team.

5.4 DISCOURSE ANALYSIS

The social constructionist philosophy of DA is more challenging to apply than the familiar structures and processes of rational strategy making. The wide array of DA approaches in the literature (Phillips and Hardy, 2002; O'Rourke 2009; Potter and Wetherell 1997; Wood and Kroger 2003) and their tendency to overlap make selection and application of an approach more demanding than at first appears. The absence of prescribed methods compounds the demands on the researcher to be creative and reflexive in how the analysis is carried out (Phillips and Hardy 2002; Hardy 2001).

Challenges notwithstanding, DA provides a new perspective on routine strategy practices and interactions and how they can be analysed. It supports a critical appraisal of often taken-for-granted exchanges in a workshop context. Experiencing the nuances of micro text analysis, (O'Halloran 2005; Samra-Fredericks 2003), how they can build to meso-level analysis of entire texts (Phillips and Hardy 2002), which then construct macro level organisation/ societal realities that may change with time and place (Jarzabkowski and Spee 2009), calls to mind the butterfly flapping its wings in one place causing a hurricane in another. Through this research, it is clearer that the inter-connectedness of our micro discourses is too often taken for granted and reduced to an over-simplified version of reality (Mintzberg 1987; 1994; Mintzberg and Lampell 1999). Using DA has enabled seeing that reality through fresh and more critical eyes.

For this study, Samra-Frederick's (2003) concept of laminating provides a valuable lens through which conclusions may be drawn from the study's findings. Each part of the analysis (themes, roles, dialogue, metaphors or identities) could be viewed as layers of a 'whole' which combine to explain how the apparently simple workshop outcome - 'to create a new vision for adult education' - was constructed from a complex interaction of disparate parts. It is clear that this is only the first stage of laminating, since lamination itself 'encapsulates [is] the important concepts of process, time, interaction and outcome'. The whole strategy process for the organisation will require more than one short workshop on a single topic. But the discourse dynamics

identified in this study may provide some guidance for future interactions, if the optimum use of time and resources is to deliver a consensus based, realistic and achievable output.

DA provides the analytic equivalent of what Senge (2006, p.68) calls 'Systems thinking....a framework for seeing interrelationships rather than things, for seeing patterns of change rather than static "snapshots" '. Used as 'a related collection of approaches to discourse' spanning theoretical assumptions, data collection and data analysis methods (Wood and Kroger 2000), DA offers the capacity to analyse any level of a situation without losing sight of the whole, or the fact that the whole is often more than the sum of the parts.

5.5   LIMITATIONS AND FURTHER CONSIDERATIONS

5.5.1 Limitations

The principal limitations of this study closely match those encountered by Thomas, Hardy and Sargent (2007). The study is focused on one workshop event. While significant as a strategy event, a more elaborate strategy process will be needed to develop the new vision proposed from the workshop. This study offers a view into how a limited but significant part of that process creates strategy.

The analysis here is also highly subjective, which Thomas, Hardy and Sargent (2007, p.31) saw as 'inevitable with a discursive approach'. Hardy (2001) acknowledges that 'research is discursively constructed ' and thus merits reflexivity balanced with pragmatism when accounting for subjectivity in analysis. Subjectivity is heightened in this case, given my role as a participant as well as the research analyst and others may see facilitator influences that have been masked by my own subjectivity.

The detailed history of the management team in this study has not been analysed as part of the discourse. It is not known if the patterns of discourse identified arose spontaneously in this single workshop, were a by-product of a coincidence of personalities or have been carefully cultivated over time through management and team training. This limitation leaves three follow-up questions:

- **Why** did the workshop structure evolve as it did?
- **Why** did the participants adopt particular roles in the workshop?
- **Why** did they adopt a dialogic pattern in their discourse?

5.5.2 Further considerations

Two key findings in this study - participant roles and dialogic discourse - have not been reported in any of the literature reviewed, in the context of strategy workshops. The analysis shows how these features were developed and deployed through the group's discourse, but it was beyond the study's scope to enquire into **why** these two features arose.

To answer these 'why' questions, a more detailed analysis of the groups background and habitual discourse practices would be required. Speculatively, it may be simply due to happenstance; or they may have practiced dialogue techniques as part of their organisation development programme; or it may be a confluence of personalities that gel into a coherent group. Further research on these questions could help to add to this report's findings.

Whittington et al (2006, p.617) suggest that the dominant economic view of strategy making taught in twenty of the top US business schools should be augmented with skills for managing strategy practices and processes, such as workshops or project management. This study humbly offers two further topics to be considered for inclusion on the syllabi of such management development programmes. While the context of this workshop must be carefully considered, strategy workshops are sufficiently ubiquitous to be able to adapt some of the roles and dialogue features highlighted here.

Building awareness of the benefits of roles in subordination of personal agendas, enabling unself-conscious exploration of topics and avoidance of interpersonal acrimony, could lead to a more productive use of time and resources.

Learning a dialogue approach would support in-depth exploration of ideas without participants feeling personally assailed - the focus would be on the ideas, thoughts and assumptions, rather than on the people taking part.

Combining participant roles with an understanding of a dialogic approach to discourse offers a potentially powerful tool to significantly enhance the productivity of strategy workshops.

Workshop facilitators, whether internal group members or external consultants, could also benefit from considering and applying the two key features identified in this study. Of particular note in this context is the potential of facilitating towards a dialogic as well as a discussion based form of interaction, but to maintain an appropriate balance to ensure an optimum group learning output (Senge 2006).

5.6   IN CONCLUSION...A PERSONAL REFLECTION

This dissertation was motivated by a desire to gain greater insight from an academic and practitioner perspective on the operation of strategy workshops.

The research process provided fresh perspectives on strategy workshop proceedings that have previously been taken for granted, but are now seen in a renewed light. The power of roles and dialogue in a strategy workshop makes me acutely aware of future interactive possibilities not previously considered. Where previous facilitation focused on supporting a balanced, discussion based approach (Bohm 1996; Senge 2006), my future approach will attend to more subtle patterns of group discourse. Seeking a better balance between discussion and dialogue should improve the productive and learning outputs of facilitated events (Senge 2006).

In spite of this report's limitations, the adoption of roles and a dialogic pattern of discourse could provide alternative ways of facilitating and participating in workshops. Any investment by organisations to implement them could be justified through improved use of time and resources in strategy formulation.

In the future, I hope other students of strategy or discourse can add to our understanding of how strategy workshops contribute to strategy formation and in particular why groups or individuals should adopt the roles or dialogic patterns that were identified in this study. They may equally find grounds to disagree with my analysis.

In either case, it is my personal hope that the findings and conclusions from this report can add to a better understanding of the potential to improve how strategy workshops operate and their contribution to the formation of organisation strategy.

APPENDICES

APPENDIX A - Initial written request to CEOs for workshop.

Hi (CEOs name),

Since our last discussion about my research for a masters in Strategic management, I've developed my research topic and proposed approach in more detail.

I'm interested in exploring how the executive develops strategy in response to the current recessionary environment. In particular, I want to use a methodology called discourse analysis, to examine how Executive team discussions contribute to strategy formulation. To make the research as relevant as possible I would be keen to engage with the full executive working on a particular strategy issue of current importance to (Organisation Name).

I would make the following suggestion to progress this overall approach:

1. The Executive identify a current issue, relevant to the institute's response to the recession, which they would like to develop a response to. If there isn't an immediate issue commonly agreed, we could use the workshop preparation process to identify one.

2. I facilitate an executive workshop (up to 3 hours) to explore the strategy options and consider an appropriate response for the institute. The aim would be to follow an approach considered normal/ standard for the Executive. (My hope is that the Executive would benefit from this as something they might normally do, independently of the research I'm carrying out).

3. The workshop proceedings would be recorded, to enable me to carry out later analysis for my research purposes. (I've attached a draft participant consent form to address ethical issues, confidentiality etc)

My overall aim is to study strategy making as it's happening. This requires a real or 'live' issue to be dealt with, in the context of what might be considered a 'normal' way for strategy formulation by the Executive.

If this approach is acceptable to the Executive I would be keen set up a date for a workshop to take place before the end of March. We would prepare and conduct the workshop in the normal way. I'll call you in a few days to discuss this a little further.

Many thanks in advance

Regards

Martin

(Issued on 22nd Feb 2010)

APPENDIX B - SITE A - EXECUTIVE BRIEFING NOTE.

(Organisation Name)

Executive Management Team Meeting - 12th March 2010

Strategy discussion on Adult Education.

Background

Adult education provision has progressively increased in (Organisation Name) since its foundation. From the onset of the recession approximately two years ago, multiple factors have impinged on the societal demands for adult education, the uptake by potential students and the expectations of those students. European and national funding initiatives for have also impacted on demand for and delivery of Adult education provisions.

Workshop purpose

The purpose of this meeting is two fold:

- To discuss strategy options relating to Adult education provisions in (Organisation Name), arising from the current recession.
- To record the Executive Management Teams discussion for later use in academic research.

Workshop approach.

The workshop will be conducted as a facilitated discussion lasting approximately one hour. A draft programme for the workshop accompanies this briefing note. Martin Duffy will facilitate the discussion and contribute an external perspective where appropriate. The format will be round table discussion, working from background on the issues, to identification of key issues and through to options to address one (or more) of the key issues. There is no prescribed outcome for the workshop.

Academic context for the workshop.

Martin is researching a dissertation in strategy formation as part of an MSc in Strategic Management. He will record the full discussion, which he will later analyse in detail using a Discourse Analysis methodology. A participant consent form accompanies this briefing note, to assure confidentiality of the proceedings from an individual and group perspective. Two other Executive management teams are expected to take part in similar workshops, on topics of specific interest to their organisations. The research will focus on **how the groups discourse contributes to the formation of strategies or strategy positions** on the relevant topics. The specific content of the discussions is of value to the participating executive teams in the course of their normal work.

APPENDIX C - WORKSHOP AGENDAS.

Site A - Workshop agenda.
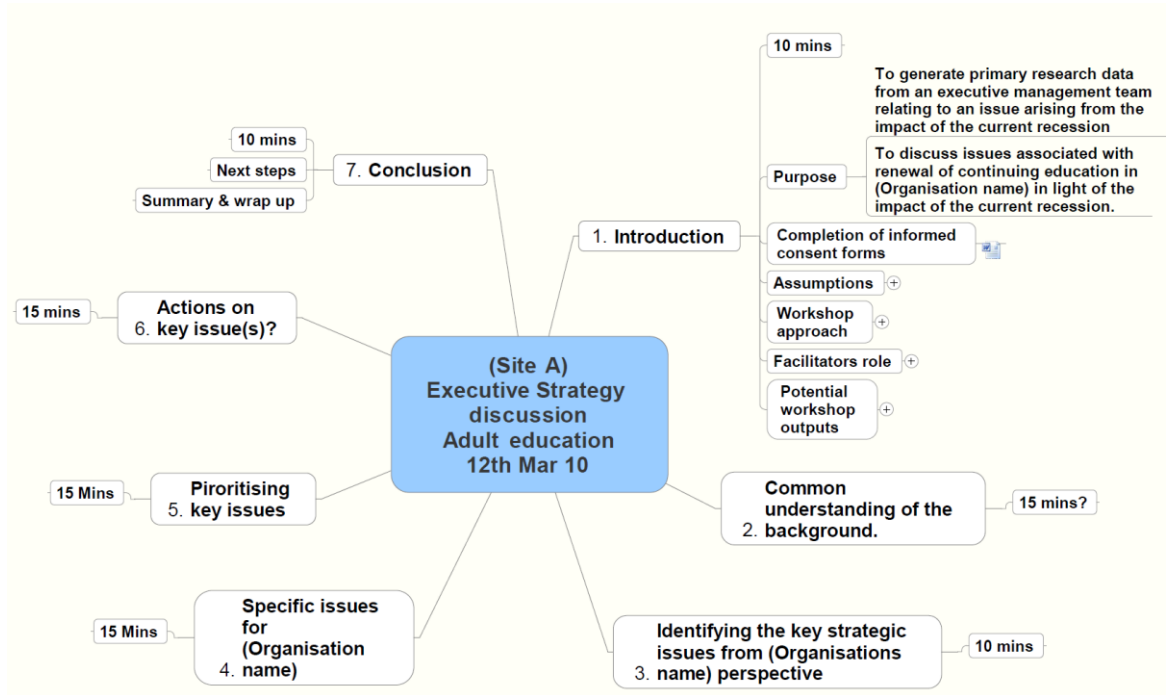
Site B - Workshop agenda.
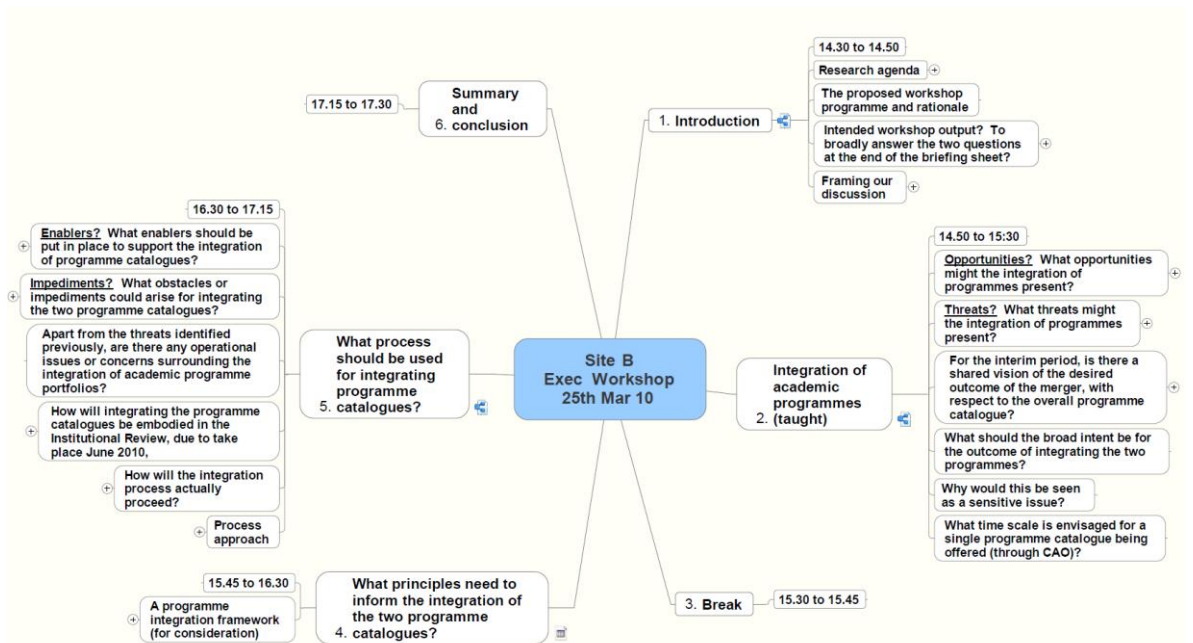
APPENDIX D - RESEARCH CONSENT FORM

Executive strategy workshop

Participant consent form

Researcher: <u>Martin Duffy</u>

Research supervisor: <u>Dr Brendan O'Rourke</u>

1. This research concerns strategy development in the Higher Education sector in response to challenges arising from dealing with unforeseen events.

2. I agree to take part in a workshop discussion involving the Organisations's Executive, for the purpose of the research named above.

3. The general nature of the workshop will be a discussion by the Executive management team, facilitated by the researcher. The specific structure and subject matter of the workshop will be agreed with the participants in advance.

4. I agree that the workshop may be electronically recorded.

5. I understand that transcripts of the recordings will be made for the purpose of only conducting the research.

6. I understand that the following specific conditions will apply to the security of the material generated from the workshop:

    a. The names of the institute or individuals will not be identified in any material written up, published or presented from this research. Every effort will be made to ensure that the Institute and individuals will not be identifiable in any material generated from this research.

    b. The recordings, and any transcripts from the recordings, will be used for research purposes only.

    c. Recordings and associated transcripts will be secured by the researcher and will only be accessed for research purposes.

7. This consent form was provided in advance of the workshop and any questions I wished to ask about the research were answered to my satisfaction.

I have read and understood the consent of this consent form as set out overleaf and I agree to take part in the research based on the conditions outlined.

Name of interviewee_____

Signature of interviewee_____

Date_____

I hereby agree to abide by the conditions set out overleaf for handling the material generated from the interview.

Name of researcher_____Martin Duffy_____

Signature of researcher_____

Date_____

APPENDIX E – SITE A - WORKSHOP OUTPUT

Note: The term Site A has been substituted for the name of the organisation to preserve confidentiality. Otherwise, the content below is exactly as remitted back to the group after the workshop.

Site A – Executive management team discussion on adult education.

The following notes are a brief summary of the Executive's discussion on adult education at a meeting of Site A Executive management team held on the 12th Mar 2010.

The initial part of the discussion identified a range of issues associated with the adult education. These issues can be divided into two parts: general issues, which are outside the specific influence of Site A and Site A specific issues, over which Site A may have some influence.

General issues:

- Adult education is generally on the fringe of our thinking in Ireland.

- CAO occupies our mainstream thinking on third level education in Ireland

- Time constraints for employers and students are a factor in uptake of adult education.

- Cost for students are a significant factor in determining public uptake of adult education

- Culturally, Ireland seems to be averse to 'old folk' going back to college.

- Government policy is slowly changing to encourage adults to pursue or return to continuing education in third level.

Specific issues for Site A

- We don't have a coherent concept throughout Site A of what continuing education actually is.

- There is a major energy and resource investment needed to sustain adult education delivery.

- Key questions - Are we meeting the needs of potential adult learners?

- Our ability to re-orient our way of delivering adult education, to enable all categories of potential students to access our core offerings.

- Overcoming stereotyping in people's minds that may act as blocks to attracting students to engage in adult education.

- Need to overcome the internal mindset of 'why can't these adult education students be just like the other students'.

- Getting our academics to be education focused in a broad sense to meet adult education student's broad educational needs rather than discipline focused on delivering only their specific education discipline.

Prioritising key issues

- Becoming self aware of self imposed limitations on our frames of reference and attitudes to what third level education generally and adult education specifically actually should be about.

- Change the vocabulary (adult, continuing education etc) and get third level education seen as available for anyone.

- Working within the constraints of the system, we need to consider how we present our adult education programmes as 'different' or 'separate' from 'normal' programmes – separate prospectus, separate promotional literature etc. Why do we separate it? Are we reinforcing the stereo type, rather than integrating the adult learner fully into the mainstream of third level learning?

Next steps

- Seek a new vision for adult education from the Adult Education Group

- Raise the issue of adult education in the context of programmatic reviews and institute review when they arise.

- Re discuss this issue in the context of any structural changes which may be recommended or arise from the Hunt report on Higher Education in Ireland.

APPENDIX F - LIST OF TRANSCRIPTION CONVENTIONS USED

(unintelligible)   the text was not clear from the recording.

[beginning of an interruption by the next participant.

]   end of an interruption by the next participant.

[(QE)]   an overspeak by the person in the () bracket.

, (coma)   a natural pause by the speaker

(name1)   the name of a person not present at the workshop.

(ML)   the first name of a participant was used by the speaker to address them or respond to a point made.

APPENDIX G – METAPHORS IN WORKSHOP DISCOURSE

Metaphors may be used as a 'linguistic resource' or as 'conceptual tools through which people communicate', to succinctly explain complex ideas, convey values or meaning, garner interpersonal leverage or re-constitute organisational identity (Mantere and Vaara 2004; Samra-Fredericks 2003; Heracleous 2004). A metaphor is defined as 'a figure of speech in which a word or phrase is applied to something to which it is not literally applicable' (Oxford English Dictionary, 2010).

In this study, metaphors are analysed to see how they affect the group discourse, participant roles, group dialogue or workshop outcome.

Metaphors were used in the workshop in 33 Turns. As a general observation, 25 metaphors are used in the first half of the workshop (up to turn 105), when the discussion largely focused on factors external to the organisation. They were used on just seven occasions in the second half of the workshop, when the general focus was on internal factors. This suggests the participants were more challenged to represent their views of external factors in a way that would be understandable to the rest of the group.

Up to Turn 66, metaphors are used as a simple means of expressing ideas. For example the first metaphor used by ML in Turn 4 (Exhibit 65 below) is a conventional way of depicting support for someone, in this case depicting the intent of adult education.

4	ML	the first leg up the ladder but it just never got traction
43	ML	it's like a barren desert
72	ML	you get very little cudos for breaking your back
91	ML	symbolic violence'
105	ML	only people who can influence the field are the people who are in it
124	ML	Once you're aware that you're part of the (overspeak - DT - the game, yea) the game and your efforts (overspeak - DT - know the rules, yea) you're reproducing it by your vocabulary,
136	ML	rules of the game aren't always, aren't set by us
159	ML	turn it on it's head was when we wanted is when we wanted to run

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 65

QE's early metaphor in Turn 14 (Exhibit 66) is partially prophetic of the significant change in the way the group ultimately views adult education and the need to create a new vision for adult education in the organisation.

14	QE	the whole recession is actually throwing all the thinking in the air,
70	QE	There's an inherent conflict almost in that.
70	QE	it's pinned to the ground
75	QE	there's a sting in the tail about it

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 66

DT's use of five metaphors (Exhibit 67 below) up to turn 35 is also conventional. After turn 35, they take on a similar quality to OD's metaphors, which are examined next.

7	DT	constant sort of see saw between objectives
11	DT	we're not totally in the human capital argument
11	DT	need to develop a human sort of a human capital that extends just beyond whether ah you know people can make the smart economy
35	DT	but we're not going there again trying to run this on a shoe string
35	DT	what's the log jam that we have to clear here
66	DT	By the rules of the (unintelligible)
77	DT	that ground is shifting
79	DT	there are shifting sands there
109	DT	the other big elephant in the room
109	DT	anybody wants to upskill they can go to the sausage factory and force feed themselves on CIPD or a truncated version of an engineering degree
182	DT	punch above our weight
193	DT	rules of the game

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 67

OD's metaphors stand out for both their nature and their short-term influence on the direction of the conversation (Exhibit 68 below). His initial metaphor in Turn 5 depicts students as raw material to be consumed by the organisation. Later metaphors in Turns 37 and 59 convey the amount of organisational 'energy' consumed in dealing with adult education students. Viewed in the

context of later combative styled metaphors, fodder could also be interpreted as analogous to 'cannon fodder', with students being expendable in a battle between Governmental policy makers and Higher Education providers.

Turn 21 is his first conflict related metaphor. Government's support for HE provision for recently unemployed people is presented as an opportunity to change attitudes towards adult education. His phrase 'opened a bunch of doors' may be analogous to opening minds and the 'chink in the amour of the state' suggests state bodies being more open to better supporting adult education.

5	OD	students comin' into the college which is the fodder that we work off and through the CAO system
17	OD	when you crunch the numbers you actually can't do that.
21	OD	that has opened a bunch of doors
21	OD	there is a chink in the armour of the state
37	OD	so it is consistent and repeated shoulder to the grind wheel stuff as opposed to it'll start spinning itself.
59	OD	repeated energy to keep that wheel turning is greater
69	OD	It's the rules of engagement
69	OD	they're the rules of the game
69	OD	changing with the shape of the pitch
69	OD	the lines of the boxes are changing a bit
71	OD	small force in a big, a big ocean
82	OD	are we swimming against a tide
112	OD	that's the conflict with what the learner wants and what you as an educationalist think the learner should be getting
190	OD	back to the real world

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 68

At Turn 69, OD uses four metaphors in one sentence, all suggesting that there is a combative war game being waged with external factors, mainly Government policy and societal attitudes to adult education.

The metaphors used by a number of other participants (Exhibit 69 below) immediately following Turn 69, reflect this sense of exertion or conflict.

These may serve as a form of venting for the group since the theme of metaphorical war games is relatively short lived.

70	QE: an entrepreneurial kind a model and we're in a bureaucracy - they do not sit well together. There's an inherent conflict almost in that but the other thing is, the bureaucratic piece of it, which is reflected in the legislation, the rules as in contracts and all of that, payment arrangements, they don't work well with the other
70	QE(later in the turn): that's why it's not developing and flourishing in the way that we thought it would, ya know because there's actually, it's pinned to the ground
71	OD: And we're only one small force in a big, a big ocean
72	ML: the other thing is you get very little cudos for breaking your back, over adult education.
75	QE: So we haven't really, there's almost a, is it a begrudgery of it, I don't know, but there's a sting in the tail about it that isn't there if you're 18 years old

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Note: *'it' in the context of turns 70 and 75 refers to adult education.*

Exhibit 69

The facilitator's metaphorical question in Turn 76 (Exhibit 70) and DT's use of similar metaphors in Turns 77 and 79 in Exhibit 67, break the combative pattern, softening the subsequent metaphorical language and making it more reflective of the language used prior to Turn 69.

Turn	Speaker	Metaphors used
3	DM	it's open season then i
76	DM	So are we swimming against a cultural tide in trying to provide adult ed?

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 70

The facilitator's metaphor 'swimming against the tide' in Turn 76 is directly echoed as a question by OD in Turn 82 (Exhibit 71 below). His question is more internally focused, challenging the extent to which the organisation is meeting the needs of adult learners.

82	OD: So are we swimming against a tide or are we accommo, or are we actually facilitating the needs of the adult learner.

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:37:46

Exhibit 71

Conclusion

OD's war-like metaphors could be what Oswick, Putnam and Keenoy (2004, p.115) characterise as 'root metaphors', in that they 'function to dominate ways of seeing', albeit temporarily in this case. Some of his metaphors had the effect of leading the group to adopt a similar but short-lived metaphorical disposition, partly reflecting a leadership role which is more fully explored in Constructing identities in Appendix H.

The effect of OD's war-like metaphors could be suggestive of Branigan, Pickering and Cleland's (2000, p.B14) 'lexical co-ordination' (rather than 'semantic co-ordination'), since the language is being mirrored by the group but the war-like sentiment is not carried any further. A more detailed level of analysis is beyond the scope of this study, since the use of metaphors didn't affect the direction or outcome of the workshop.

Overall the metaphors used could be described as 'weak' (Heracleous 2004, p.184) or more specifically as 'superficial devices' because they have 'limited impact-generating potential' (Oswick, Putnam and Keenoy 2004, p110). They enabled the participants to vent their feelings at the sense of conflict between the organisation and external policy agents. However, they didn't have any significant effect on the dialogic pattern of the group's discourse or the final outcome.

APPENDIX H - CONSTRUCTING IDENTITIES

Conversation can be used to create, promote or destroy identities. This section identifies 'the ways in which participants themselves actively construct and employ categories in their talk' (Wood and Kroger 2000, p29).

Two distinct types of identities were constructed during the workshop – organisational and personal.

Organisational identity.

DT put down the first marker about organisational identity in Exhibit 72.

11	**DT: now the question is to me in terms of the role of higher education are we going to be leaders or followers in terms of this**
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:12:25	

Exhibit 72

This stark question so early in the workshop appears to lay down a challenge to the group regarding the organisations role and identity in adult education provision. QE picks up the sense of organisation identity in Exhibit 73

14	**QE: in this organisation the mindset of the greater part of the organisation is with that CAO thing.**
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:14:23	

Exhibit 73

QE later explicitly asserts a sense of leadership for the organisation in Exhibit 74

34	**QE: we're pushing it here, something about our mission, that we're pushing it but we're not bringing the wave of the organisation with it**
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:21:24	

Exhibit 74

In the qualifying 'but' clause the 'we' seems to refer to the executive rather than the whole organisation. While leading through 'pushing', the admission of not bringing the whole organisation with them suggests that there is still

work to do for the whole organisation to become a leader as questioned by DT in Exhibit 72 above.

DT immediately follows (in Exhibit 75) with both a qualification of the cost of leading (turn 35) and a strong statement of the benefits of the adult education being provided by the organisation (turn 38).

35	DT:	but we're not going there again trying to run this on a shoe string.
38	DT:	when they come here you can see that transformation that happens, not only to their personal lives but to their families and the whole sort of society and the community they're living in

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 75

The emotive appeal of 'transforming' people's lives seems to act as a spur to the group, with ML highlighting the uniqueness of the organisation in Exhibit 76.

40	ML:	Not yet but a good example recently was (external company name that crystallised a lot of what *Our Organisation* can do that others just can't.
43	ML:	somethin about the values and beliefs that, that a large majority of *Our Organisation* staff adhere to, and I think if you went back and asked people what attracted them to *Our Organisation*, a lot of them, there is somethin about the mission, there is somethin about doin somethin different and that every now and again comes to the fore
141	ML:	and I see it here all over the campus, is how individuals do take a personal interest in the students, a lot of them, no matter what their role is, they see it as ya know, there is a personal connection there and they do it in all different kinds of ways and it's not just the domain of the academic, everybody in *Our Organisation* is part of the education process and I think slowly but surely

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 76

The concentration of self-reflection and some self-criticism in the first half of the workshop prompted OD to call for some credit for the good work done to date by the organisation (Exhibit 77 below).

98	OD: We also need to keep this conversation in perspective ..... so we need to celebrate what we're doing as well.
108a	OD: yes, so what I'm saying , don't lose sight of the good stuff we are doing, don't undersell what we are doing
135	OD: But ya see, I think you're putting yourself down a bit there,
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes)	

Exhibit 77

This may also be an indication of OD taking on a leadership role in the absence of the CEO, a topic examined in more detail in Appendix G.

All of these contributions in the first half of the workshop suggest a willingness for the organisation to adopt the leadership role implied in DT's opening question in Exhibit 72, but is grounded in a realistic appraisal of past performance and future prospects.

QE follows this up later in the workshop (Exhibit 78) with his insight into what might be holding them back and areas they might examine to make progress in the future.

119	QE: And I think one of the things, one of the things that struck me (ML), was are we subconsciously as an organisation actually reinforcing the status quo? (overspeak - ML - of course..) or is our language in our publications and our opening and everything else, are we doing something?
Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 00:57:22	

Exhibit 78

QE's views expressed in this turn went on to be adopted as a key action point from the workshop, in part because it crystallised the previous discussion around the organisations attitudes towards adult education and partially because it identified internally actionable items that the group accepted as deficient and needing attention.

The overall identity created by the group's discourse is one of leadership, with a strong track record in adult education provision, but tempered by resource constraints and work yet to be done on how they conceive of adult education.

Personal identity.

Individuals' identities in this workshop were largely asserted through the distinct role each participant played in the discussion.

This section examines the construction of one participant's identity as the group leader, why it was necessary and how it was constructed through their discourse.

Due to an overrun in the preceding meeting the CEO was unable to attend the workshop. OD expressed concern that the discussion could therefore be limited and decisions may not be feasible. From the start, this established a latent identity question about who would carry out the normal role of the CEO. There is evidence in the discourse to suggest that OD implicitly took on this role, which is explored below.

The issue was explicitly raised by ML in Exhibit 79 (Turn 177).

177	ML:	And you see what's missing is , if (name) was here now she'd cut through all that talk in three minutes and tells us this is what we're [doing in the next twelve months
178	OD:	This is what we're going to do, yea]
179	DM:	Well, well that's going to be, that's going to be my next, I'm not going to tell you what we're going to be doing but my next job is to say…
180	DT:	the meeting ….it's all going to be sorted ..laughter
181	OD:	We'll all be redundant by 5 o'clock this evening, (laughter)
182	DM:	The question, as the nominated facilitator as a basic wrap up question is , next steps. Having had a conversation, having identified some issues not the whole broad brush all issues, but some key issues, having identified two key issues that might be pertinent to *Our Organisation* and that might actually be actionable, might, (overspeak - ML - well the next ...), out of, where do you take this conversation?

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 01:11:00

Exhibit 79

The facilitator partly addresses the concern (turn 179) but explicitly declines the CEO role of telling the managers what they will be doing. This leaves the basic question in Turn 182 still to be answered – "next steps?"

Turns 183 to 185 simply continue the discussion, when DT significantly gives way to a gesture from OD to speak (Exhibit 80, turn 185). OD interjects in a leadership role to focus the group on their next steps (Turn 186).

185	DT:	There's no, yea, I think really, yea, sorry, go ahead (OD)...
186	OD:	This conversation has just cost the state a thousand euro - what have we got that we can bring forward from this conversation? That we didn't have at the start of it.
187	QE:	Well I have a better understanding, I have a better understanding of the problem
188	ML:	Well (OD), it didn't really cost the state a thousand euro, because whatever was on my table for the last three hours will be done tonight or it'll be done on Sunday, ya know, ...
189	QE:	and just in case you're packing up I still have ..(overspeak - ML - I have to go..) items on the agenda, it's the budget.. Cost plans to be approved, (overspeak - ML - oh, jaysus..) because people can't get money
190	OD:	Come back to the real world (mixed overspeak)
191	DM:	well, ok, from my point of view, as your facilitator for today, I'll, I'll push back out just the key bullet points that I think we've discussed, which is basically what I've been recording here (indicating the computer), I won't be taking it off the tape, I'll be simply recording the way that I record as a facilitator, I'll give you back two key bullet points that I've summarised and nobody overtly disagreed, but OD, you did qualify it you said so long as we don't actually[....

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes), starting at time mark 01:12:32

Exhibit 80

OD is clearly asking for something to 'bring forward' from the workshop (Turn 186) and then to "come back to the real world" (Turn 190), the real world being the need for the management team to have something tangible or actionable following their commitment of valuable time (Turn 186) to the workshop. His thinking pointedly reflects Hendry and Seidl's (2003) idea that strategy workshops enable executives to switch from operational focus to strategic focus, and that their three-part, workshop structure enables transition from one to the other. OD's intervention explicitly starts the concluding phase of this workshop (Exhibit 81, turn 199).

199	OD:	So how do we get it out of here, that's what I'm trying to figure out ?...
202	OD:	But that, that's something that could be pushed out, is to then, an action for us here is to try and get this binary, fulltime part-time less visible. But if we just stop with this conversation here and we all go for lunch, ...
204	OD:	Well, ya see, I'm listening to what DT said there and I'm saying if we have this big ideological problem with parsing ourselves into part-time full-time prospectuses, we need to give some of the task of blurring those lines as an active action if we feel that's what we need to do to take the next step forward?
208	OD:	I wouldn't be as optimistic as that now DT, but anyway (overspeak - DT - what do you want to,,,?) I wouldn't be as optimistic that MLs concept of universal programme design would address that issue, (overspeak - DT - alright..) that to me is, it is more a marketing issue, which is the words we use to portray this place, and they are coming from two documents with two frame of mind and two sets of ..unintelligible,... driving it..
211	OD:	Yes] and that includes terminology [
213	OD:	but if we don't follow through on that, we're all just going to go to lunch and we will stay ….

Source: Transcript from audio record of the Executive management team's strategy workshop (Duration 1 hour 20 minutes).

Exhibit 81

In OD's subsequent turns (Exhibit 81) he assumes the facilitators role, using a series of questions and summary statements to build a clear understanding of what the group's follow-up actions should be, a role that ML had previously suggested (Exhibit 79, Turn 177) the CEO would do 'in three minutes'.

In the absence of the CEO, and with the facilitator explicitly confining his role to coaxing rather than pushing for a clear actionable outcome, OD progressively adopted the identity of the group leader. He didn't impose his own view of what the outcome should be or overtly tell the group what they had to do. This was shown in turn 204 by an explicit acknowledgement of listening to one participants point and the rhetorical question following his summary of what the group had previously said. His final turn has the subtle use of the word 'just' suggesting that if there isn't a follow-up on the agreed actions, the workshop will amount to nothing more than a precursor to a normal lunch break.

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