

VALUE CONGRUENCE, PSYCHOLOGICAL SAFETY, AND THE LEARNING CULTURE:

AN ACTION RESEARCH PROJECT

by

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(Under the Direction of Karen E. Watkins)

ABSTRACT

In my action research study, I delved into the dynamics of value congruence and psychological safety and their impact on the organizational learning culture. The research questions that guided me were as follows:

- (1) What is learned at the individual, group, and system levels about value congruence and psychological safety, and how do they affect the learning culture within a business unit of a large research university?
- (2) To what extent is the effect of value congruence and psychological safety linked to the learning culture?

To conduct this study, I utilized the Dimensions of the Learning Organization Questionnaire (DLOQ) developed by Marsick and Watkins (1999) and Yang et al. (2004), Amy Edmondson's (1999, 2018) research on psychological safety, and Chris Argyris's (1980) theories of action as the foundational frameworks. Through a case study and action research design, I collaborated with community members at a professional education unit in a US-based institution of higher learning. Together, we devised a series of interventions targeting psychological safety, value congruence, and their effects on the learning culture.

The results, analyzed using multiple regression analysis, revealed that both value congruence and psychological safety have a meaningful and positive influencing role in shaping learning organization culture, and these relationships are statically significant (beta + .671 and .209, respectively). The findings highlighted the importance of clearly defining desired values, providing examples of expected behaviors, and establishing relevant connections to day-to-day activities to foster conditions for value congruence and psychological safety. Additionally, the implementation of accountability measures was identified as crucial in achieving value congruence and psychological safety within the community.

This study emphasizes that organizations valuing a learning culture should articulate their values clearly and cultivate a culture of safety. Doing so enables the identification and resolution of deficiencies, contributing to a more robust and effective learning environment.

INDEX WORDS: action research, DLOQ, dimensions of the learning organization questionnaire, higher education, learning organization, learning culture, professional education, psychological safety, value congruence, leadership

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DEDICATION

I dedicate this dissertation to everyone – EVERY SINGLE PERSON who has ever started this journey and did not finish to every single person who will not be granted the privilege of studying at this level and being challenged in this way. I see you, and I recognize the space of privilege that I currently occupy. I dedicate my life and the rest of my life's work to busting down barriers for anyone who desires to occupy this space with me. Be still and know – that if this is what you want, I am personally dedicated to removing barriers and advocacy in this space. I believe that every person deserves access to quality education at all levels – from K to Gray!

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CHAPTER ONE

INTRODUCTION AND LITERATURE REVIEW

Introduction to the Context and Problem

LaTrese, we have employees not getting along. Can you come over and lead a learning session on X? LaTrese, we have managers who are not managing well. Can you come over and facilitate a discussion on Y? We have had this data breach, or this employee is acting unfavorably; what training classes do you have that they can take?

I have spent many years working in various organizations responding to requests such as these. Through my experiences, I have observed that organizations with strong values embedded in their organizational culture can proactively anchor learning to those values and build a less reactionary culture. In organizations such as Cisco, Hilton, American Express, Microsoft, and Accenture, all listed among the top 15 most admired companies (Fortune, 2022), employees can explain each of the company's values and how they personally act on them. Unfortunately, "when organizations don't articulate clear values, individuals are left to their own devices to determine what values should guide them" (Stoner, 2017, para. 12).

In my organization, we have for many years had learning competencies and knowledge about what it means anecdotally to serve and behave as a professional community member, but nothing concrete. Without a unifying anchor, organizational and personal value incongruencies begin to present themselves. There is a saying from my hometown: "The stronger you build your anchor, the better you will hold firm no matter what kind of storm is raging around you."

Organizational values often can serve as that anchor.

My organization suffered much unpleasant media coverage and many years of fractured culture, and its community members experienced workplace discomfort, as evidenced in the data collected in the organization's 2019 comprehensive administrative review (CAR) report.¹ This confidential survey, sent to over 12,000 staff, faculty, and graduate students, obtained more than 6,200 responses. Approximately 1,200 employees said that they did not believe that leadership's actions always aligned with its stated values, and more than 500 stated that they did not view their supervisor as engaging in ethical business practices. I suspect that this incongruence arose partly because our organization had no anchor, common language, or shared values that we espouse. Values are meant to be guiding principles that provide broad guidelines on how to behave on a day-to-day basis; "when an organization shares the same values, they will develop...collective habits" (Stoner, 2017, para. 15).

Following the 2019 CAR survey, a 10-year strategic plan grounded on a new mission statement and nine strategic values was introduced. It is essential that the mission and the values be more than mere words on paper. I was excited about this new plan for a few reasons. With it, we were able to create a proactive learning curriculum to build skills based on these values. These values have provided a firm foundation on which our campus culture continues to be shaped. Moreover, I was able to study a topic near and dear to my heart and perhaps improve my organization, informed by Chris Argyris's work on people, organizations, and the incongruencies between what they say and what they do, also known as their *theories of action* (Argyris, 1980).

Our community advanced our values with a campaign called "Guided by our Values." The objective was to help the organization bring our values to life in tangible ways to fulfill our

¹ To preserve confidentiality, documents generated by the organization, such as the CAR report, are not included in the reference list in keeping with best practices stated by the seventh edition of the American Psychological Association (APA, 2019) *Publication Manual* (p. 278).

strategic plan goals. Our values were meant to unite our community around a set of shared beliefs, assumptions, and expectations for how we interact with one another and carry out our work. These values lie at the heart of our organizational culture and are the “how” we deliver our mission, pursue our vision, and achieve our goals. The work to align values is foundational to strategy execution and culture alignment. My big questions were: Why do people do what they do? How do people make decisions? Why do we often say one thing and do another? Do people learn from their experiences? How do we measure such learning and make meaning of the incongruences we find? My starting point was Argyris and Schön’s (1974) argument that people have mental maps concerning how to act in situations that inform how they plan, implement, and review their actions. Mental maps are a mix of objective knowledge and subjective perceptions or opinions. According to Argyris and Schön (1974), these maps, rather than the theories or values individuals explicitly espouse, guide people’s actions. Moreover, few people are aware of the maps or theories they use (Argyris, 1980). One way of making sense of such incongruence is to describe it as a split between theory and action. Argyris and Schön (1974) suggested that two *theories of action* are involved in this process: theories-in-use and espoused theory.

Chapter Overview

The first chapter of this dissertation frames the problem with opportunities surrounding a potential disconnect between organizational espoused values and the values in use, as well as opportunities related to psychological safety. The literature review includes a description of the theories informing this study, including empirical studies on value congruence, psychological safety, and the learning organization. This chapter concludes by presenting the purpose of the study, the project, and the research questions.

Problem Statement

Historically, our organization has taken a reactive approach to developing employees, developing learning to support employees based on some infraction that has happened rather than proactively cocreating an organizational culture. This reactive approach has yielded no sustained outcomes, as evidenced in the results reported in the 2019 CAR report from more than 3,500 employees. A proactive strategy is necessary and requires planned and persistent work (Pareek, 1977). Organizational culture is “the set of shared, taken-for-granted implicit assumptions that a group holds and that determines how it perceives, thinks about, and reacts to its various environments” (Schein, 1996, p. 236). Schein offered a definition of organizational culture that encapsulates its commonly articulated facets: collective values, beliefs, and assumptions. Studies have shown the importance of employees sharing values with one another and with the organization for which they work (Jehn et al., 1997; Meglino et al., 1989). Moreover, research has shown that when there are (a) overlaps between individuals’ personal values and the values of the organization and (b) similarities between individuals’ perceptions of the organization’s values and those values as perceived by others, employee satisfaction, commitment, and turnover improve (Ostroff et al., 2005).

The problem in this study was that our organization found itself with a fractured community culture in which community members did not feel that their organization shared their values, did not feel valued as employees, and did not feel comfortable speaking up about negative events and environments, which led to performance challenges. Such hesitance was attributed to an organizational culture in which we espoused our values but experienced a perceived disconnect in how those values were implemented. Such disconnection was further evidenced in the results from the last campus culture survey, conducted in 2020, which was

broken down into two sections: (a) values (observations, behaviors, and practices) and (b) psychological safety and engagement. The results of this survey, taken from an organization-generated PowerPoint presentation, are shown in Figures 1.1 and 1.2.

Areas of opportunity were identified related to the frequency with which respondents observe values being demonstrated. The growth areas indicate a potential disconnect between espoused values and values in use. There were also areas of opportunity related to psychological safety.

Values

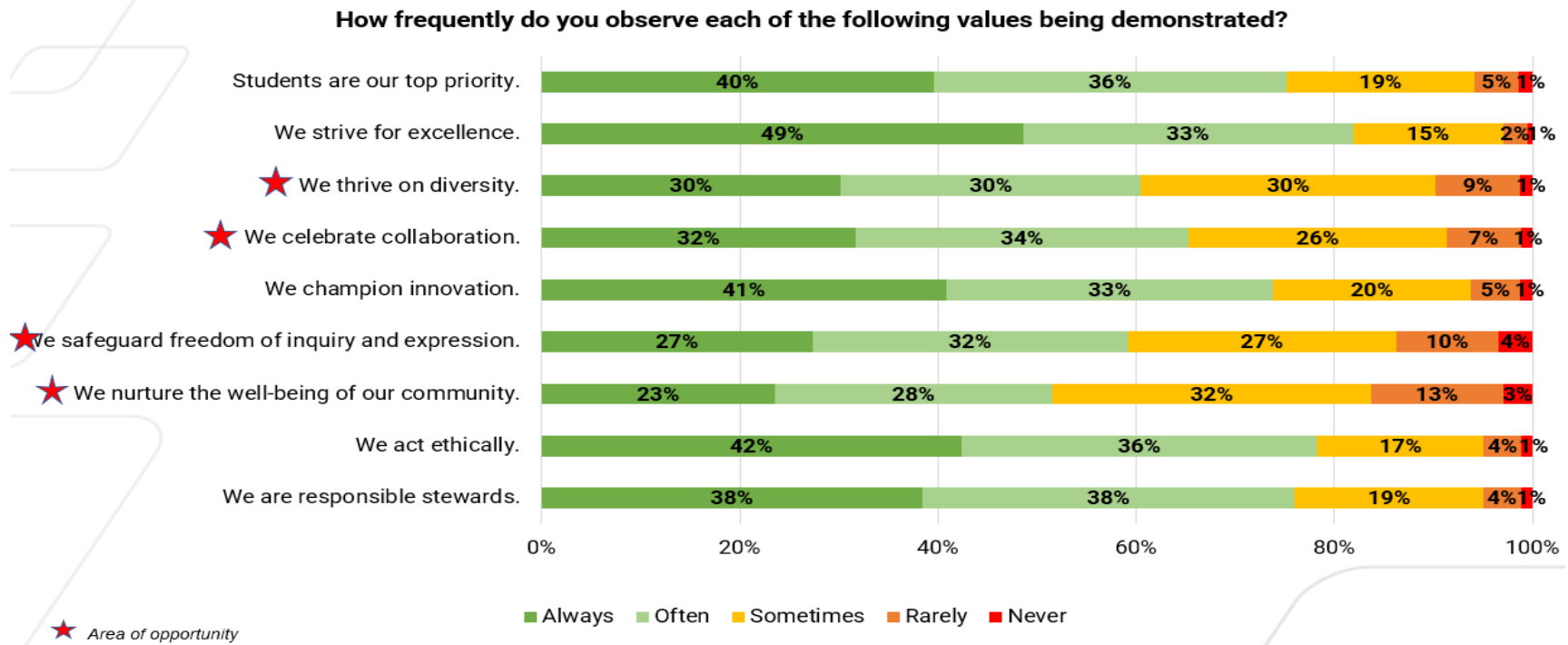
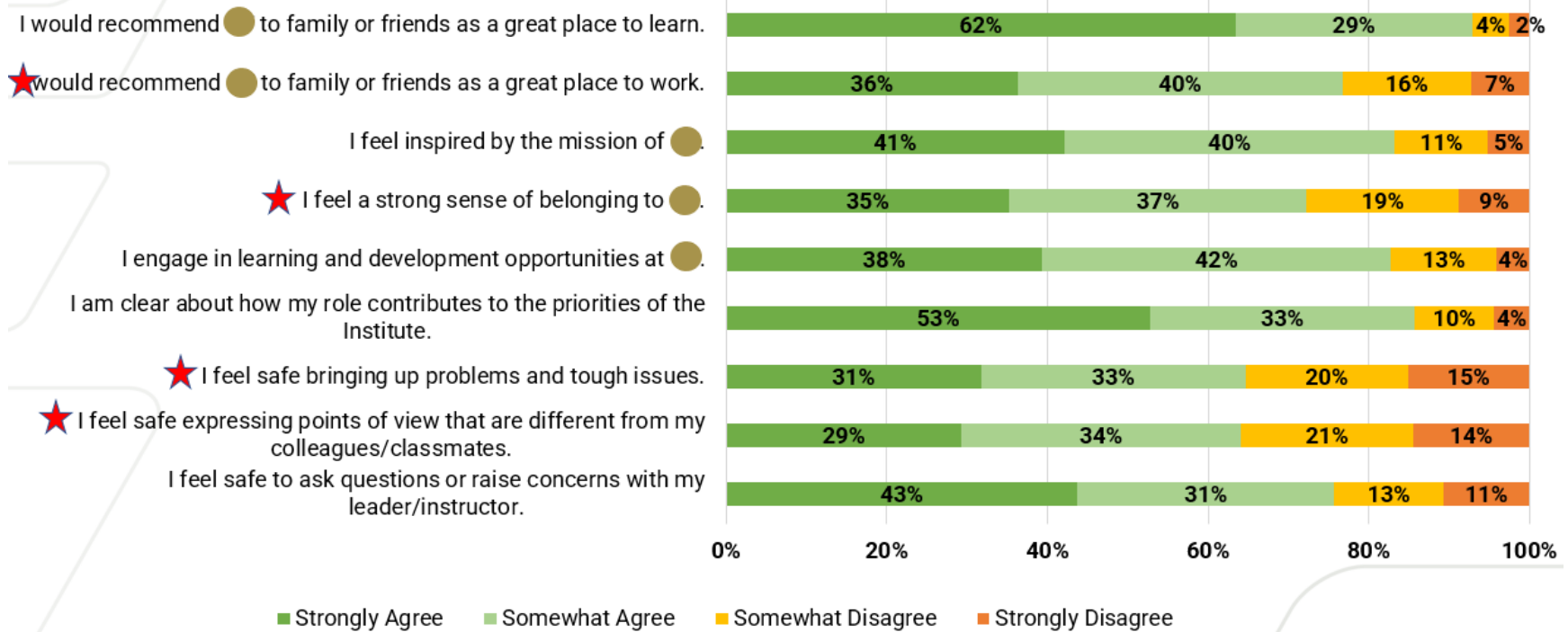


Figure 1.1. *Values (Observations, Behaviors, and Practices).* Note. From the 2020 Campus Culture Survey.

Psychological Safety & Engagement

Based upon your experiences as a faculty/staff member, please indicate how strongly you agree with the following statements:



★ Area of opportunity

Figure 1.2. *Psychological Safety and Engagement.* Note. From the 2020 Campus Culture Survey.

This study examined a fractured community culture in which team members reported opportunities for improvement regarding feeling valued and safe enough to speak up about negative events, environments, and perceptions. We studied what could be learned about value congruence and psychological safety and the impact of these concepts on organizational learning culture. As emphasized by Xu et al. (2019), organizations need to focus on creating conditions that engender psychological safety for employees instead of focusing solely on employee traits. The problem is illustrated in Figure 1.3.

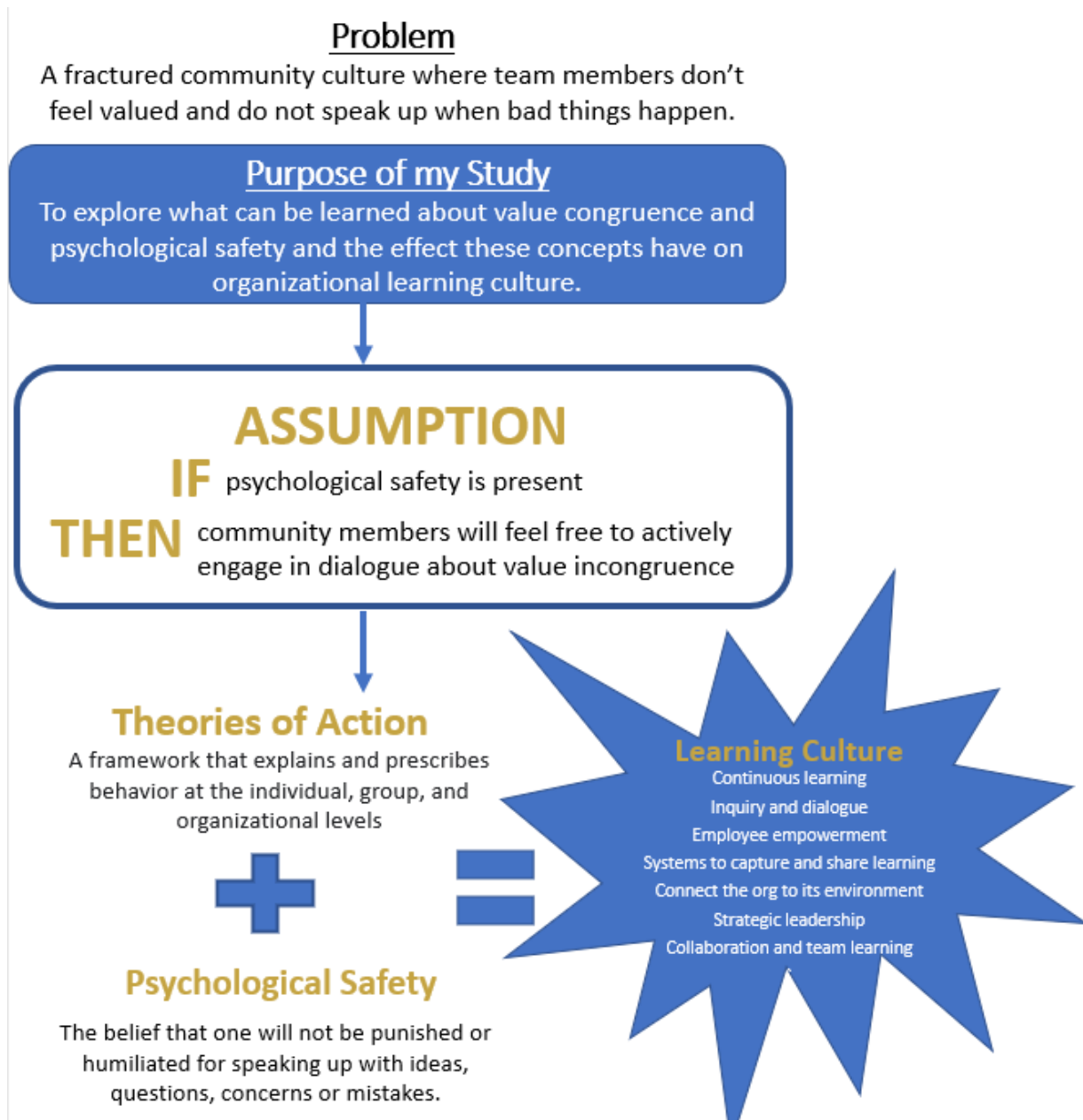


Figure 1.3. *Illustration of the Problem.*

Jehn et al. (1997) studied a group of full-time employees enrolled as part-time students at two business schools and full-time Master of Business Administration (MBA) students at a third business school and found that value congruence among members decreased both relationship and task conflict. Moreover, the specific content of the values held by members influenced

performance (Jehn et al., 1997). According to Meglino et al. (1989), the advantage of a strong corporate culture is that positive outcomes result when employee values are congruent with those of other employees and with the organization. They studied 191 production workers, their supervisors, and 13 managers at a large industrial products plant and determined that workers were more satisfied and committed when their values were congruent with the values of their supervisor. Ostroff et al. (2005) investigated a sample of 951 employees from 113 bank branches and found that similarities in and shared perceptions of values between individuals and the organization were positively correlated with employee satisfaction, commitment, and reduced turnover. Xu et al. (2019) highlighted that organizations should focus more on creating conditions that engender psychological safety instead of focusing attention exclusively on proactive traits exhibited by employees.

Theoretical Framework

Chris Argyris's work has significantly influenced how we think about the relationship between people and organizations. At the heart of Argyris and Schön's work is *theories of action*, in other words, how we link our thoughts with our actions, which they divided into espoused theory and theory-in-use (Argyris & Schön, 1978). The espoused theories are those we know about and articulate. In contrast, theories-in-use are implied by our behavior and are often unknown to us. Hence, espoused theories are those values that an individual or an organization claims to follow, whereas theories-in-use are those values that can be inferred from the actions actually taken by organizations and individuals (Argyris et al., 1985).

Interestingly, few people are aware of the maps or theories they use (Argyris, 1980). There is a split between theory and action such that what we call upon when we speak about our actions to others may—and often does—differ from what we actually do. The words we speak or

the image we would like others to hold about what we do constitute our “espoused” theory, while what we actually do is our theory “in use.” Argyris and Schön (1974) explained that

When someone is asked how he would behave under certain circumstances, the answer he usually gives is his espoused theory of action for that situation. This is the theory of action to which he gives allegiance and which, upon request, he communicates to others. However, the theory that actually governs his actions is this theory-in-use, which may or may not be compatible with his espoused theory; furthermore, the individual may or may not be aware of the incompatibility of the two theories. (pp. 6–7)

Argyris (1980) argued that effectiveness results from developing congruence between theory-in-use and espoused theory. At my organization, we assert that we value diversity, yet our hiring practices do not bear that out. As just one example, our organization’s most senior ranks are highly homogeneous and have remained relatively undiversified across the past 50 years. In addition to Argyris’s theory work, his primary research methodology has been action science case interventions, which formed an interesting grounding for my action research (AR) study.

Argyris and Schön (1974, 1978, 1993) generated an extensive body of research, which can be quite complex. Nonetheless, the case studies they provided to illustrate their assertions are compelling. Several authors (Diamond, 1986; Greenwood, 1993; Newman, 1999) were impressed with the ability of Argyris and Schön to produce the changes they predicted with their participants. Nonetheless, these scholars noted some limitations to Argyris and Schön’s approach I sought to acknowledge when conducting my AR study. First, some noted that the ability to replicate Argyris and Schön’s facilitation style, which is a key component of their process, may be limited, which could hinder further positive results. Others reported that Argyris and Schön’s research does not appear to document their research structure or plan, which further emphasizes

their reliance on themselves as facilitators and experts (Newman, 1999). Another critique pointed out the lengthiness of their processes; for example, the case of the group on which *Increasing Leadership Effectiveness* (Argyris, 1983) was based spanned two years of very slow progress. While most scholars have agreed that significant change takes time, there seems to be a need for a faster way to achieve the same results produced by Argyris and Schön's approach. One interesting perspective that I have noticed in my work is that asking people to confront inconsistencies in their behavior feels inherently threatening and will likely trigger defensiveness even in the most psychologically safe environments. Finding a way to minimize the threat by increasing trust so that individuals feel comfortable analyzing their weaknesses is an important consideration. It is worth noting that these critiques are of the practice, not the theory, described above. Hence, the theoretical framework for this project was guided by both theories of action and by psychological safety.

Situating the AR Study in the Literature

This literature review included peer-reviewed articles, books, and book chapters from UGA Libraries databases, including Google Scholar, EBSCO Complete, Business Source Complete, PsycINFO, and ERIC. The search terms used were theories of action, theory-in-use, espoused theory, values congruence, theories on psychological safety, learning organization and organizational change theories. This initial keyword search yielded more than 5000 articles, from which studies not associated with large organizations, adults in the workplace, or higher education were excluded. The goal was to find studies that integrated both theories of action and psychological safety, but unsuccessful searches resulted in me independently finding empirical research on each theory. Empirical literature that informed the theories mentioned in the previous section was reviewed, and three articles on value congruence, four on psychological safety, and

three on the learning organization were ultimately selected based on their research design and relevance to my topic. The literature review reflected an insufficient number of studies examining the effect of psychological safety on value congruence, indicating an underexplored research focus that this study helped mitigate. This study explored value congruence and psychological safety and the effect of these concepts on organizational learning culture.

Psychological Safety

The concept of psychological safety has developed over time. Psychological safety fundamentally concerns reducing interpersonal risk, which necessarily accompanies uncertainty and change (Schein et al., 1965). The early origins of the concept lie in Kurt Lewin's change model, developed in the 1940s, which proposed three stages of change that organizational leaders must understand: unfreezing, changing, and refreezing (Lewin, 1947). Lewin's model has been described as similar to understanding how the shape of a block of ice changes: "To change a solid square block of ice to a cone, you have first to melt the square block, reshape the water and then refreeze it to form the new solid shape" (Worsley et al., 2013, p. 130). Lewin's model represents a simple yet practical model for understanding the process of organizational change. Edgar Schein built on and extended this model in his research in the 1960s on organizational change, which discussed the need to create psychological safety. Schein's (1996/1999) theory considered both individual- and group-level change as "a profound psychological dynamic process involving unlearning and relearning as one cognitively attempts to restructure one's thoughts, perceptions, feelings, and attitudes" (Schein, 1996/1999, p. 62). Building upon these understandings, modern research has defined psychological safety as

a shared belief that a team is safe for interpersonal risk-taking, a sense of confidence that the team will not embarrass, reject, or punish someone for speaking up. The confidence

that one will not be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes. This confidence stems from mutual respect and trust among team members. (Edmondson, 2018, p. 6)

As Edmondson (2018) noted, “When there is high psychological safety, organizations can learn, grow and reach their full potential” (p. 26). Edmondson found that creating a psychologically safe workplace enhances team performance and that the best-performing teams have two features in common: equity of communication and emotional sensitivity.

In my attempt to link theories of action with psychological safety, organizational change and organizational learning, a prevailing question was how organizations learn or fail to learn. Argyris stated in an interview:

I think it is important to distinguish between enabling organizational learning and producing it. Enabling organizational learning includes group, inter-group, and organizational features such as policies, practices, rules, and organizational memory. Producing organizational learning is done by individuals taking action. (as cited in Crossan, 2003, p. 40)

Individuals do not take action if they do not feel psychologically safe (Edmondson, 2018). Research on individual learning has informed how scholars approach organizational learning (Crossan, 2003, p. 40). According to Argyris, the answer to the question of “How do you know when you know something?” is “Can you produce what you claim you know?” (Crossan, 2003, p. 41). Thus, the “operational criterion for learning” is the ability to detect and correct errors (Crossan, 2003, p. 41).

Psychological safety describes people’s perceptions of the consequences of taking interpersonal risks in a particular context, such as a workplace. An individual who experiences

psychological safety perceives that s/he is free to be his or her true self without fear of reprisal or negative consequences (Kahn, 1990). Employees feel psychologically safe when they “stay within the boundaries of appropriate behavior” (May et al., 2004, p. 17). That is, employees whose actions align with their supervisors’ preferences likely feel more confident that their approaches to work will be rewarded (Edmondson, 1999). Research has suggested that psychological safety enables teams and organizations to learn and perform (Carmeli & Gittel, 2009). For example, psychological safety helps explain why employees share information and knowledge (Collins & Smith, 2006; Siemsen et al., 2009), speak up with suggestions for organizational improvements (Detert & Burris, 2007), and take the initiative to develop new products and services (Baer & Frese, 2003). Organizational research has identified *psychological safety* as a critical factor in understanding phenomena such as voice, teamwork, team learning, and organizational learning.

Workplace Psychological Safety and Employee Voice

Employee voice is a specific form of proactive behavior that entails speaking up with constructive ideas and opinions about work-related issues (Grant & Ashford, 2008; Morrison, 2011). Voice can contribute to organizational success because it increases decision-making quality (Morrison & Milliken, 2000), learning (Edmondson, 2018), and innovation (Argyris & Schön, 1978). Employees who are given a chance to voice their opinions and concerns feel a heightened sense of control over their work, which facilitates higher levels of satisfaction and motivation (Morrison & Milliken, 2000). Employees pay particular attention to supervisory cues when deciding whether to engage in voice (Morrison, 2011). Because supervisors can dictate whether their subordinates will be rewarded or punished for engaging in voice, employees are likely to pay particular attention to their supervisors’ preferences for workplace behaviors

(Magee & Galinsky, 2008). Research has suggested that when supervisors and subordinates take congruent approaches to work, employees will feel comfortable engaging in voice behaviors because they perceive a higher degree of psychological safety. This study sought to add to the body of knowledge by exploring the relationship between high personal and organizational value congruence and high psychological safety.

Managers should not underestimate the importance of congruent communication and deliberate interventions in building and maintaining psychological safety, and they should allow psychological safety to facilitate performance. Employees can help through their willingness to speak up and challenge the status quo. Managers, moreover, must learn to value employees who engage in such behaviors, even though they may instinctively prefer employee silence and agreement with the status quo. Of course, psychological safety is not a panacea for addressing all organizational collaboration and learning challenges. Rather, an interpersonal climate of safety must be combined with other essential ingredients (e.g., strategy, vision, goals, authentic and supportive leadership) to best enable learning and performance (Edmondson & Lei, 2014).

Value congruence may also, I argue, be conceptualized as authentic leadership. Gardner et al. (2005) defined authentic leadership as the process whereby leaders are aware of their thoughts and behaviors within the context in which they operate. Authentic leaders are often aware of their own and their subordinates' values, moral perspectives, strengths, and knowledge (Avolio & Luthans, 2006). They are regarded as mindful of both their own personal authenticity and the manner in which they allow employees to achieve common goals and objectives (Clapp-Smith et al., 2009). There is consensus in the literature that authentic leaders act according to their true values. The larger question becomes whether leaders' espoused values manifest in congruent words and actions. Maximo et al. (2019) conducted a quantitative study of 244

employees in the South African mining industry to examine the influence of authentic leadership on psychological safety, trust in supervisors, and work engagement through various inventories, including the Workplace Trust and Psychological Safety questionnaire. Their main findings indicated that authentic leadership (or value congruence) was a significant predictor of trust in supervisors and psychological safety. Further, this study found that authentic leadership (value congruence) had a statistically significant indirect effect on work engagement through trust in supervisors. This study notwithstanding, limited empirical evidence exists concerning the relationship among value congruence and authentic leadership, work engagement, psychological safety, and trust in supervisors, particularly in higher education. This study aimed to contribute to the studies conducted on this topic and help fill this gap in the research.

Table 1.1*Selected Studies on Psychological Safety*

Author(s) & date	Purpose	Method (s)	Sample	Key findings	Relation to my study
Huang et al. (2008)	The authors focused on how R&D teams perform successfully. This study analyzed psychological safety in team performance and examined the mediated effect of team learning on psychological safety and team performance in technology R&D teams.	Surveys	A total of 100 members of 60 technology R&D teams	(1) Psychological safety has an effect on team performance, and (2) team learning mediates the relationship between psychological safety and team performance.	If team members feel safe, they are more likely to ask questions, raise issues, and enable learning. People are often unable to see value incongruence in themselves, so such learning will require others to feel safe enough to speak out.
Taştan, S. B., & Türker, M. V. (2014)	This study examined the relationship between organizational culture and employees' job involvement. Moreover, this study investigated the moderating role of employees' psychological	A survey was conducted using the Organizational Culture Questionnaire (OCQ), the Job Involvement Scale, Psychological Meaningfulness,	A total of 264 respondents in banking, insurance, and finance organizations	The findings supported the literature, asserting a positive relationship between organizational culture and job involvement. In particular, when the organizational culture is perceived as supportive and achievement-oriented, the employees exhibited more commitment and involvement.	My study examined the factors that could potentially enhance employees' feeling safe enough to point out incongruent behaviors. This study shows that

Author(s) & date	Purpose	Method (s)	Sample	Key findings	Relation to my study
Kark, R., & Carmeli, A. (2009)	conditions, meaningfulness and safety.	and Psychological Safety Scale	A total of 128 part-time graduate students who held managerial and nonmanagerial positions in their work organizations	Feelings of psychological safety directly affected employees' individual involvement in creative work, and employee vitality partially mediated the relationship between employees' psychological safety and their involvement in creative work. These findings highlight that researchers and managers need to consider how the interpersonal work context can foster feelings of vitality and creative behaviors at work.	a supportive and achievement-oriented culture aids in that pursuit. As with my study, if one cannot see value congruence in oneself, an organization where the organizational culture's trust is high will likely elicit connection and safety to point out incongruence, thereby increasing organizational learning.
Higgins et al. (2020)	This study explored how organization-level psychological safety, in conjunction with another aspect of workplace climate,	Survey	A total of 170,000 survey responses from teachers in 545 schools across three years	Multilevel analyses unexpectedly showed that psychological safety is not, on its own, "helpful" regarding organizational performance over time. Indeed, the best	As related to my study, psychological safety alone is not the silver bullet for change at the

Author(s) & date	Purpose	Method (s)	Sample	Key findings	Relation to my study
	impacts organizational performance over time.			conditions for fostering organizational performance occurred when psychological safety was relatively low and felt accountability was relatively high.	organizational level over time. Hence, I am studying value congruence and psychological safety.

Value Congruence

Carl Rogers introduced the concept of incongruence to psychology in 1957. Rogers defined congruence as the alignment of experience and awareness. Incongruence was, therefore, a lack of congruence, or a misalignment between feelings and actions (Rogers, 1957). One of Rogers's most significant contributions to psychology was his theory of self (Rogers, 1980/1995). He believed that every person has multiple selves, including the perceived self (how they see themselves) and the ideal self (how they would like to be). Rogers stated that perfect overlap between the perceived self and the ideal self represents a state of congruence (Rogers, 1980/1995). Rogers also believed that a state of perfect congruence was an impossible ideal.

The concepts of congruence and incongruence have informed organizational behavior research. Many elements in Argyris and Schön's (1993) model help explain how we link our thoughts and actions. Those elements include:

- Governing values, or constancies, that we seek to keep within an acceptable range. They are a mix of motives, values, beliefs, and feelings that tend to keep us in check.
- Action strategies, which are behaviors we engage in to manage our immediate surroundings. Argyris (1983) would say they are intended to keep the governing values within an acceptable range.
- Intended and unintended consequences for ourselves and others, which are the end effects of our action strategies and the response they incite in others.
- Action strategy effectiveness, which helps us confirm the maintenance of our governing values.

Egan (1983) explained these concepts through the following example:

For one person, the values of winning may be very important (Governing [value])...I will hesitate to cooperate with others if it means that they might win instead of me (Action strategy)...The person bent on winning is viewed with suspicion. The legitimate needs of other people are pushed aside, and the goals of the organization become secondary to winning (Consequences for self and others) if this can be done without blowing his or her cover. (pp. XIV–5)

Informed by the work of Argyris and Schön, Dick and Dalmau (1990) developed the concept of an information chain to explain and inform behavior. Research has shown that it is not uncommon for professionals in the workplace to profess an espoused theory regarding what is mandated, research-supported, and best practice (Stewart, 2015). Nonetheless, their actions may communicate otherwise. This disconnect between theories-in-use and espoused theories is not uncommon given increasing demands and pressures in the workplace (Stewart, 2015). Although many professionals espouse the benefits of having strong organizational values, the practices of those professionals and organizations are often not closely linked to the best practices noted in research and publication, which indicates some level of incongruence.

There is wide acceptance of the relevance of values to human behavior at the individual, group, organizational, and societal levels of analysis (Rokeach, 1973). At the individual level, values and value systems (groups of values) are seen as desirable, transitional goals that serve as guiding principles, although they may vary in importance (Schwartz, 1992). Values and value systems are important influences on a person's beliefs, attitudes, and perceptions; they are employed to influence attitudes and actions and to act as standards for guiding and justifying action and decision-making behavior (Rokeach, 1973).

Organizational values are the standards referenced in judging acceptable behavior and behavioral norms for individuals within the organization. At the organizational level, there is general agreement that organizational culture involves a set of cognitions shared by members, that these cognitions are acquired through social learning, and that they include values, shared understandings, and patterns of beliefs and expectations (Rousseau, 1990). In recognition that values are an integral part of both organizational learning systems and their moral and ethical systems, many organizations have attempted to promote an understanding of the goals and actions necessary to reinforce a clear set of core values that underpin this stance. However, a distinction must be drawn between the values the organization espouses as important via its published mission statements and its values in action, i.e., those that are actually used to guide work activities and reflect organizational practices (Argyris & Schön, 1978). In some cases, these may be at odds. Therefore, it is appropriate to examine individuals' perceptions of the organization's values in action via the behaviors of the organization and its constituents rather than merely its espoused values, as the values in action and behaviors are more likely to predict actual behavior and provide the cues that guide ethical behavior within the organization (Finegan, 2000). Suar et al. (2010) highlighted the importance of congruence between personal and organizational values; however, their findings indicated that alignment between one's espoused personal values and values in use more potently and consistently decreased unethical practices and increased positive work behavior compared to value congruence between personal and organizational values.

Argyris (1983) discussed the internal conversations in which we explain our actions to ourselves as situations in which we believe that we are doing one thing but are, in reality, doing something slightly different. We often make sense of our actions by filtering them through the

lens of an espoused theory. As Stephen Covey (2006/2018), author of *The 7 Habits of Highly Effective People* and other leadership works, noted, “data from tens of thousands of participants” in his workshops “demonstrate the tendency most of us have to judge ourselves by our intentions and others by their behavior” (p. 128). Thus, to promote value congruence in the workplace, we must examine who among us feels psychologically safe enough to point out these discrepancies that we largely cannot see in ourselves.

Value congruence effects may be explained by trust and communication (Edwards & Cable, 2009). My study aimed to explore the impact of psychological safety (i.e., trust) on value congruence in organizational settings. For this project, I conceptualized trust as akin to psychological safety. Edwards and Cable (2009) illustrated that value congruence and communication are prevalent when trust/psychological safety is high; accordingly, my research focused on measuring and increasing trust. Amos and Weathington (2008) suggested that employees’ perceived congruence of employee and organizational values is positively associated with their satisfaction with the job and the organization and with employee commitment to the organization. When personal values align with organizational values, job satisfaction is high. In my study, I sought to understand whether there is a relationship between high job satisfaction, trust, and value congruence. Table 1.2 provides an overview of the relevant literature on value congruence and its relation to my study.

Table 1.2*Selected Studies on Value Congruence*

Author(s) & date	Purpose	Method(s)	Sample	Key findings	Relation to my study
Edwards, J. R., & Cable, D. M. (2009)	The authors developed and tested a theoretical model integrating four key explanations of value congruence effects, framed in terms of communication, predictability, interpersonal attraction, and trust.	Internet survey	A heterogeneous sample of employees from four organizations. A total of 997 employees completed the survey, yielding a 27% response rate.	Results pointed to trust as a key explanation of value congruence effects, followed by communication.	Trust is akin to psychological safety. This study illustrated that value congruence and communication are prevalent when trust/psychological safety is high, justifying the focus on measuring and increasing trust in my research.
Amos, E. A., & Weathington, B. L. (2008)	The authors analyzed value congruence across seven dimensions and its relation to (a) job satisfaction, (b) organizational commitment, (c) satisfaction with the organization as a whole, and (d) turnover intentions.	A questionnaire that contained measures of value congruence, job satisfaction, organizational satisfaction, organizational commitment, and turnover intent	A total of 151 undergraduate and graduate students from a midsize university in the southern United States	The results suggested that employees' perceived congruence of employee and organizational values is positively associated with their satisfaction with the job and the organization and with employee commitment to the organization.	When personal values align with organizational values, job satisfaction is high. In my study, I sought to understand whether there is a relationship between high job satisfaction, trust, and value congruence.

Author(s) & date	Purpose	Method(s)	Sample	Key findings	Relation to my study
Jehn et al. (1997)	The authors investigated value congruence and demographic dissimilarity among group members as factors influencing various types of conflict within workgroups.	Group observations and questionnaires	The sample included 88 teams of five participants each who were full-time employees enrolled as part-time students at two business schools or full-time MBA students at a third.	Value congruence of members decreased both relationship and task conflict, and the specific content of the values held by members influenced performance.	A shared set of values reduces conflict within working groups and illustrates the need to amplify values to find similarities so that learning can transpire.

Learning Organization

Huber (1991) identified four constructs and processes in organizational learning: (a) knowledge acquisition, the process by which knowledge is obtained; (b) information distribution, the process by which information from different sources is shared and leads to new understanding; (c) information interpretation, the process by which distributed information is ascribed one or more commonly understood interpretations; and (d) organizational memory, how knowledge is stored for future use. Several studies have examined the relationships between psychological safety and outcomes related to organizational learning.

Marsick and Watkins (1997) claimed that “people will not experiment, take risks, share knowledge, and be motivated to contribute to the organization’s success unless they believe that they will be supported and rewarded for doing so” (p. 83). Thus, organizations where individuals do not experience trust and psychological safety must enact culture change to support new initiatives to stimulate learning. Assessments of organizational learning can be an essential step toward recognizing what needs to change or, later in the process, what has changed to support these initiatives.

Previous research on organizational change has suggested that psychological safety is a critical factor in reducing resistance and enabling people to cope with change. For example, Edmondson and Woolley (2003) investigated the outcomes of a change program designed to promote organizational learning in a large manufacturing company and found that change initiatives can reach different degrees of success in different parts of an organization, depending on interpersonal context. Because studies have shown that psychological safety varies significantly across workgroups within the same organization, this study focused on one unit within a large research university versus dichotomous, organization-level outcomes.

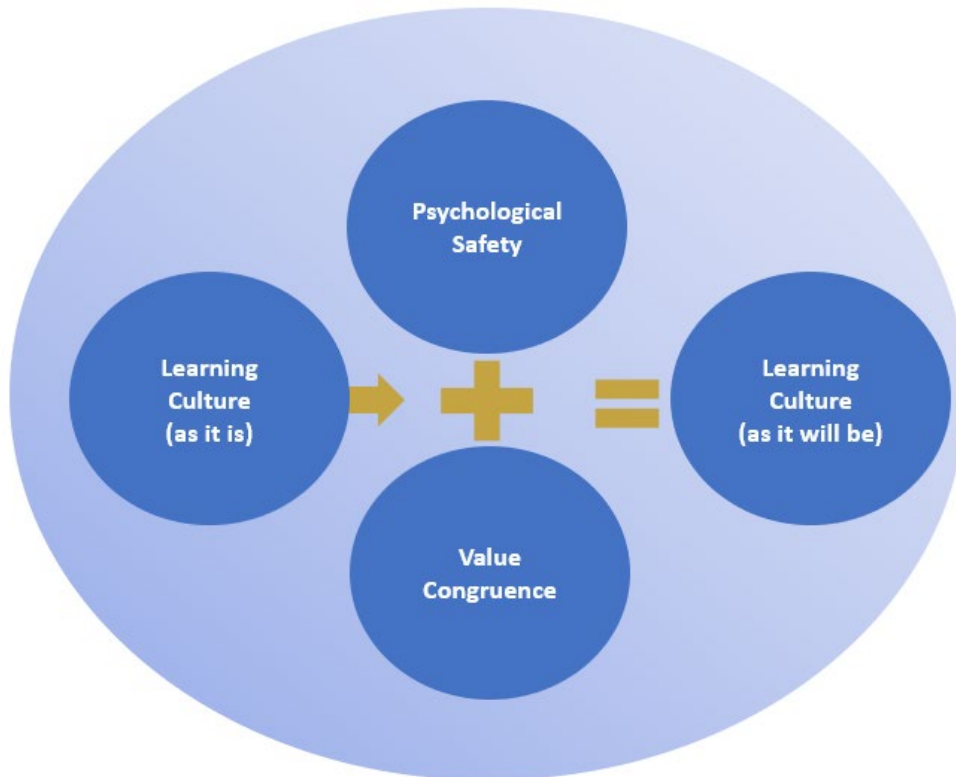


Figure 1.4. *High-Level Theoretical Framework.*

Organizational Learning Culture

An organizational learning culture is a collection of organizational conventions, values, practices, and processes (Nabong, 2015). These conventions encourage employees and organizations to develop knowledge and competence. Learning effectiveness in a learning organization is achieved when individuals within the organization are working and learning together rather than individually; shared learning enables greater efficiency (Nabong, 2015). When the organization and the people within it commit to a set of values and associated behaviors that act as a guardrail against counterproductive behavior, the organization has parameters by which everyone operates, which helps steer team members in the same direction

and provides a level of oversight and accountability. Watkins and Marsick (1999) identified key practices at the individual, group, and organizational levels in learning organizations:

- (1) creating continuous learning opportunities;
- (2) promoting inquiry and dialogue;
- (3) encouraging collaboration and team learning;
- (4) creating systems to capture and share learning;
- (5) empowering people toward a collective vision;
- (6) connecting the organization to its environment; and
- (7) providing strategic leadership of learning.

Cura (2016) conducted a study of 773 university staff, academicians, and administrators in a higher education institution and discovered that it is possible for private and public universities to become learning organizations. Bui and Baruch (2012) examined the learning organization framework using a sample of 687 employees in the UK and Vietnam and found that employees in a collectivist culture were more likely to be committed to the process of becoming learning organizations compared with those from an individualistic culture, although such development was still possible for employees from either culture. Leufvén et al. (2015) studied 230 hospital employees and demonstrated that organizations, no matter the industry, need to be adaptive to change and able to facilitate the uptake of new evidence and assess organizational capability to learn. The application of the DLOQ provides valuable insights and understanding when designing and evaluating efforts for improvement. Table 1.3 provides an overview of the selected relevant literature on learning organizations and their relation to my study.

Table 1.3*Selected Studies on Learning Organizations*

Author(s) & date	Purpose	Method(s)	Sample	Key findings	Relation to my study
Cura, F. (2016)	The author evaluated the capability of higher education institutions in northern Iraq to become learning organizations.	DLOQ	A sample of 773 university staff, academicians, and administrators	Findings showed that higher education institutions have great potential to become learning organizations.	This study illustrated that becoming a learning organization in higher education is possible. I explored the factors required to achieve this state in my public research institution.
Bui, H. T. M., & Baruch, Y. (2011)	This study examined a learning organization framework in higher education with an international context.	DLOQ	A sample of 687 employees in the UK and Vietnam	Employees in a collectivist culture are more likely to be committed to the process of becoming a learning organization compared with those from an individualistic culture.	My study explored these concepts at the individual, group, and organizational level.
Leufvén et al. (2015)	The aim of the study was to assess context using the Dimensions of the Learning Organization Questionnaire	DLOQ translated and administered	230 employees at all levels of the hospital	The DLOQ can be used and applied in hospital settings in low-income countries, despite being designed for and mainly utilized in company settings.	The DLOQ provides valuable insights and understanding when designing interventions.

(DLOQ) in a low-
resource health
setting in Nepal.

This study explored what has been learned about value congruence and psychological safety and the impact of these concepts on organizational learning culture. If we increase psychological safety, community members should feel free to actively engage in dialogue about value incongruence. Does an increase in psychological safety close the gap between the organization's espoused values and its theory-in-use? With knowledge of congruence gaps, increased psychological safety, and community commitment to organizational values, can we further enhance the learning culture and increase efficiency in administrative operations? Below is a depiction of the theory of change tested in this AR study to enhance an organization's learning culture by achieving value congruence through increased psychological safety.

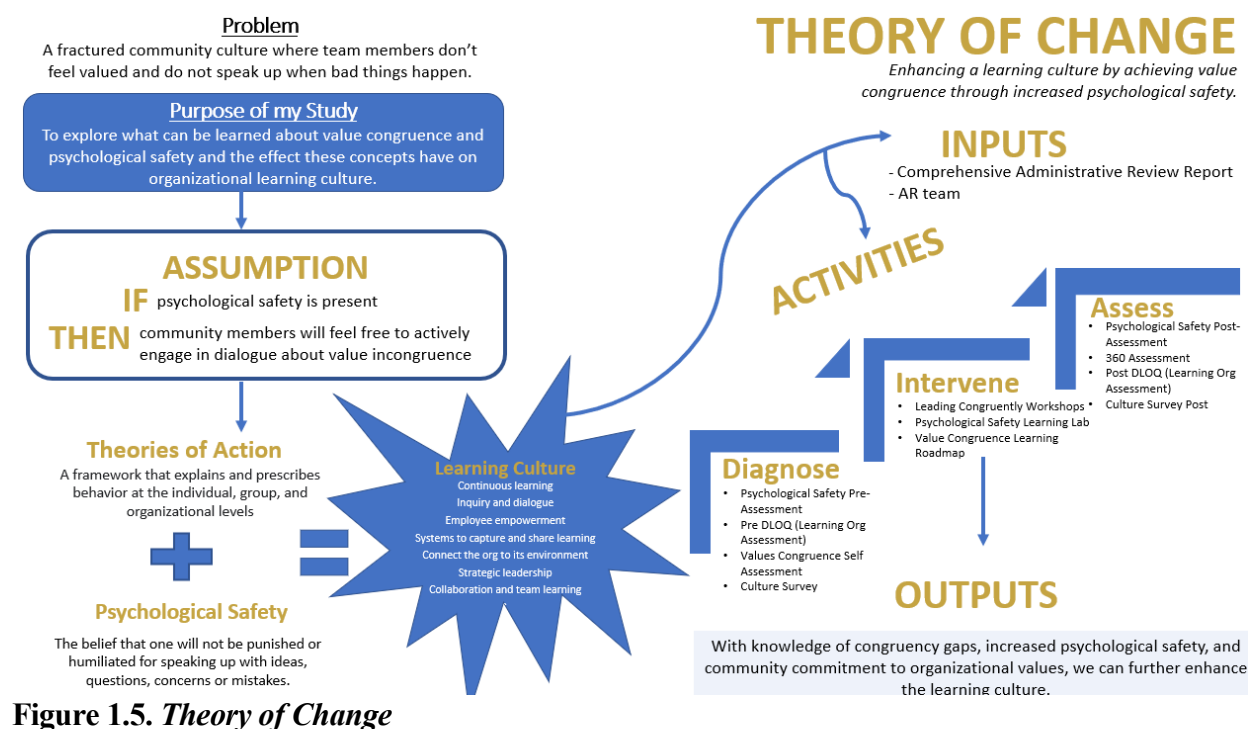


Figure 1.5. Theory of Change

Statement of Purpose and Research Questions

This AR study explored insights gained individually, at the group, and at the system level as we acted on embedding our values within our organizational culture. We identified what was learned about the impact of enhanced value congruence and psychological safety on the organizational learning culture. Together with my AR team, we investigated the role of psychological safety, value congruence, and how the presence and nurturing of a culture of learning could enable and enhance organizational effectiveness. The following research questions guided this study:

RQ1: What is learned at the individual, group, and system levels about value congruence and psychological safety, and how do they affect the learning culture within a business unit of a large research university?

RQ2: To what extent is the effect of value congruence and psychological safety linked to the learning culture?

The specific focus of this project sought to (a) inform and educate the community about the behaviors necessary to demonstrate our values, (b) determine what elements need to be present to ensure congruence, (c) measure how we are doing, and (d) course-correct through interventions.

Summary

This chapter framed the problem of a fractured community culture where team members did not feel valued and did not speak up about negative events and environments. The belief underlying the AR study was that if psychological safety is present, then community members will feel free to actively engage in dialogue about the disconnect between espoused theories and theories in use. The goal was to enhance the learning culture by achieving value congruence

through enhanced psychological safety. This chapter provided an overview and discussion of the literature related to value congruence, psychological safety, and the dimensions of the learning organization within the research context. The three remaining chapters detail the specifics of the AR study.

CHAPTER TWO

ACTION RESEARCH METHODOLOGY

Overview of Action Research

Action research (AR) is “a pragmatic co-creation of knowledge with, not about people” (Coghlan, 2019). Several approaches to AR have emerged since its inception, each grounded in Kurt Lewin’s early work. Action research is utilized in organization development as a process of solving real-world problems within an organization through creating and leading change that the organization cares about (Coghlan, 2019). Action research adds to the body of knowledge related to a particular topic while improving professional practices and processes to enhance an organization. The action researcher studies opportunities for growth within the organization by researching how others have addressed similar problems in the field, developing and implementing theory-based applications, and working with a team through a participatory approach to develop and support the organization’s needs. This approach can potentially bring positive change to the organization.

As I sought to study and discover value incongruence in my organization, AR offered the perfect way for both me as the researcher and the organization to learn from interventions and potential change. Amid the many initiatives sponsored by my organization, one of note aligns directly with value congruence and creating a culture where it is expected that community members will live our values every day. Each AR team member is routinely engaged in “co-generating knowledge” to benefit themselves and the organization (Coghlan & Brannick, 2014, p. 6). In this process, members of the organization actively work alongside the researcher, as

equal partners, to frame and solve a specific problem. The people involved have a genuine interest in proactively solving the particular issue and, thus, make an ideal research team. When participants are actively engaged, they take ownership of implementing the solution and feel a sense of accomplishment.

As Coghlan and Brannick (2014) have explained, the “rigor of your inquiry is demonstrated by how you expose these activities to critique and how your conclusions are supported by your development of theory or usable knowledge” (p. 30). McKay and Marshall (1999) outlined a framework for rigor in AR constructed around four categories: (a) conducting the research, (b) conceptual significance of the study, (c) practical significance of the study, and (d) presentation of the study. Each of these elements was carefully considered and aligned with the critical milestones of our program. With these things in mind, as the researcher, I used the scholarly literature to help me frame and define the problem, leveraged the knowledge and expertise of my AR committee, sought guidance from my major professor and committee, and personally reflected on my experiences in an effort to ensure that the methods I employed enhanced the study’s validity and reliability.

The AR Cycle

Action research is a cyclical process in which a researcher (and, by extension, often the organization) examines complex issues and actively works to create solutions, beginning with the prestep of defining context and purpose and then following four basic steps: (1) constructing, (2) planning for action, (3) taking action, and (4) evaluating the action, basing future planning on the outcomes of the action (Coghlan & Brannick, 2014, p. 6). This cycle is illustrated in Figure 2.1.

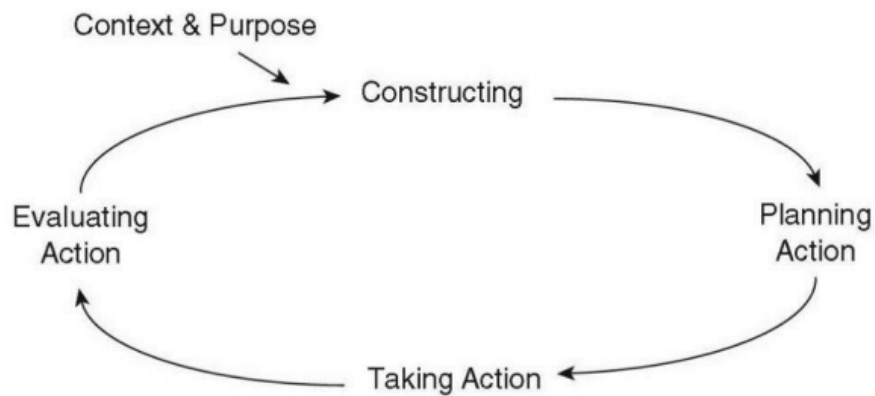


Figure 2.1. *The Action Research Cycle.* Note. From *Doing Action Research in Your Own Organization* (p. 8), by D. Coghlan & T. Brannick, 2014, Sage. Copyright 2014 by Sage.

In any AR project, multiple AR cycles operate concurrently, and these cycles typically span different periods (Coghlan & Brannick, 2014). As Coghlan and Brannick (2014) have explained, concurrent AR cycles are similar to a clock on which the revolutions of the three hands are concurrent, with the revolutions of the second hand enabling those of the minute hand, and the revolutions of the second and minute hands enabling the movement of the hour hand.

Figure 2.2 illustrates this concept.

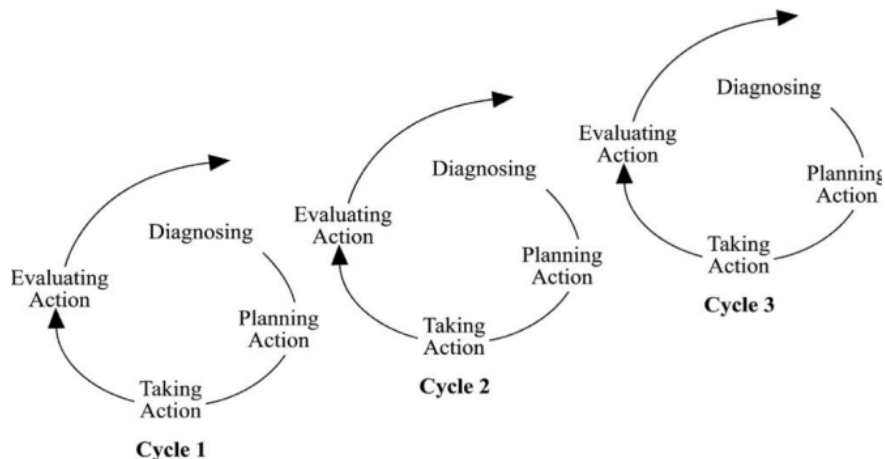


Figure 2.2. *Concurrent Action Research Cycles.* Note. From *Doing Action Research in Your Own Organization* (p. 170), by D. Coghlan & T. Brannick, 2014, Sage. Copyright 2014 by Sage.

Orders of Change

Action research is capable of facilitating first-, second-, and third-order change at the organizational level. First-order change in an organization consists of improving on what already exists, often through finding ways to increase efficiency. First-order change typically results in incremental improvements that are consistent with the organization's existing culture. Second-order change is characterized by a behavior change that requires a new way of thinking and doing. Unlike first-order change, which is largely ameliorative, second-order change substitutes one state for a better one. In contrast to these two, third-order change consists of consistently repeating second-order change in response to environmental demands. It is present in organizations that continuously operate from questions rather than answers and are always willing to question and change their beliefs. An organization committed to continuous improvement requires third-order change. However, it is much harder to identify third-order change because it must be observed over time. The iterative nature of AR makes it a perfect way to approach a change project as a practitioner and scholar. Action research invites various

perspectives, is pragmatic, and uses multiple sources of evidence as researchers seek to measure impact. Moreover, its cyclical nature facilitates observing organizational change over time.

Implementing AR in This Study

In its original and simplest form, the AR cycle comprised a prestep and three core activities: planning, action, and fact-finding (Lewin, 1942/1997). For this research project, I used the AR approach described by Dickens and Watkins (1999): reflect, plan, act, and observe. This approach included three AR cycles, which is common in AR studies (Coghlan & Brannick, 2014). As I considered AR in my organization, I checked my own biases, identified problems, worked with the AR team to produce interventions, and deployed strategies that we reflected upon and turned into best practices.

Reflect

I entered each stage with reflection. When researching one's own organization, there are inevitable biases. Through personal reflection, I was able to recognize those biases and actively mitigate the associated risks. Both as an individual researcher and as part of my AR team, I examined and reflected on publicly available data that helped frame the problem, which included the CAR, campus culture survey, and other sources. By collecting data around the problem and then feeding it back to the organization through my interpretive framework, I was able to identify the need for change and the direction that change might take (Dicken & Watkins, 1999). The AR team reviewed the theoretical foundations and organizational data and diagnosed the issues within our organization.

Plan

The AR team planned action based on our learning from the issue's context, purpose, and framing. In this stage, we looked forward, recognized the probability of risk, considered

unforeseen circumstances and constraints, and involved and informed our champions of change. We had a train track in my hometown that separated the neighborhoods from the town square. If a person had something important and timely to do in the square, we would say, “Make sure you plan for the train” to remind them of the necessity of considering any obstacles that may impede their progress. “Planning for the train” is what we used as our mantra during the planning stage. Through appropriate planning, we were able to ensure, to the greatest extent possible, that the problem diagnosis was accurate. Once we accomplished this stage, we moved into taking action.

Act

During the “act” stage, the AR team took deliberate and controlled actions to implement our interventions. As indicated by its name, it was during this stage that we began to see our plan in action. While we had been very deliberate in our planning, we were guided by the plan, not controlled by it, which allowed needed flexibility to respond to our observations.

Observe

Observation included documentation of the effectiveness (or lack thereof) of the interventions. I observed the process, effects, circumstances, and constraints to provide critical feedback for myself and the AR team on interventions and self-reflection. This observation was followed very closely by retrospectives on meetings, conversations, and interactions. The AR team examined the outcomes (intended and unintended) together and verified that the correct course of action had been taken. Were the effects desirable? Did we gain new understanding by accounting for a variety of perspectives?

Data Collection Methods and Sample

This study was meant to affect meaningful change within my organization and contribute to the body of knowledge on value congruence and psychological safety within organizations.

Action research offered me a way of systematically exploring my topic through planning, observing, and reflecting on different interventions to improve understanding and develop and deliver effective interventions. This study employed mixed methods but focused primarily on collecting and analyzing qualitative data, which considers naturally occurring, ordinary events in natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them (Denzin & Lincoln, 2005, p. 2). Qualitative data also have a strong potential for revealing complexity nested in an authentic context, helping us understand how and why things occur, potentially even accessing causation (Miles et al., 2014).

Sampling

The sample for this study was both purposive and theory driven (Miles et al., 2014). As Merriam and Tisdell (2015) have explained, purposive sampling is “based on the assumption that the investigator wants to discover, understand and gain insight and therefore must select a sample from which the most can be learned” (p. 96). Specifically, this study focused on one academic/business unit within a large public research university. I draw this distinction in terminology as this academic/business unit is primarily a self-sustaining, revenue-generating unit, making it slightly different from large academic-only units on our campus. This unit offers professional development courses, certificate programs, and online master’s degrees to career-focused individuals in STEM, business, and leadership fields worldwide. This academic/business unit is the work home of 132 faculty and staff members, who are responsible for helping organizations power forward, providing multiple pathways to the world-class offerings at Pinnacle University (PU).² Therefore, the choice of participants was purposive to ensure their association with the Pinnacle University Professional Education unit (PUPE). Table 2.1 outlines

² Pinnacle University is a pseudonym employed to preserve the confidentiality of research participants.

the employee groups, the number of participants in each group, and the types of data collected from each group in the study.

Table 2.1

Data Collected From Participants

Participants	Total	Description	Data collected
Action research team	5	Cross-representation of peers and colleagues across the PU community	Meeting and interview notes, DLOQ survey results, final interviews
PUPE staff committee	11	Nominated members within the PUPE community	Focus group and interview notes
PUPE team members	132	PUPE community members	DLOQ survey results
PUPE workshop attendees	79	PUPE community members	Session notes taken by the researcher, postintervention surveys
Executive leadership team	7	Senior leaders of PUPE who directly report to the dean of PU	Observation, researcher notes

Data Collection Techniques and Instruments

The observation stage of AR involved data collection. The techniques and instruments through which I collected data and evidence for this stage were documents, surveys, interviews, focus groups, assessments, and reflection.

Documents

As I began investigating this study's problem, I referenced public record information from campus culture assessments and the 2019 comprehensive administrative review (CAR) findings report for my organization. In this report, more than 3,500 employees contributed

critical perspectives, experiences, and information about their work through surveys, focus groups, and interviews. This data, along with archived media clips, illustrated many years of fractured culture, set the stage for the organizational problem, and, in some ways, laid out suggestions for improvement. It highlighted the need for values and grounding principles around organizational norms related to living our values every day.

Surveys

Data collected from the organization's culture survey detailed participants' collective opinions on how our organization's behavior matched its expressed values. The survey results helped determine any necessary changes in strategy, leadership needs, new investments, and organizational changes. The AR team also leveraged two highly validated survey instruments to collect more updated data: the Dimensions of Learning Organization Questionnaire (DLOQ) (Marsick & Watkins, 1999) and seven items related to psychological safety (Edmondson, 1999, 2018). Both have been validated in many different contexts and have demonstrated adequate construct validity and reliability to measure the learning organization/value congruence and psychological safety, respectively. We referred to the abbreviated form of the DLOQ created in 2004 by Marsick and Watkins in conjunction with Yang, which has 21 items rather than the original's 43, but with similar construct validity and reliability (Yang et al., 2004). In addition, we used one item from the *strategic leadership for learning* dimension of the DLOQ (Marsick & Watkins, 1999) to measure value congruence. We also used seven items adapted from Edmondson (2018, p. 20) to measure psychological safety. In accordance with Edmondson (2018), the negatively worded items were reverse-scored to indicate that disagreement with the item indicated higher psychological safety (p. 20).

To increase reliability, the researcher and the AR team reviewed the questions and tested and retested items with a pilot group of respondents. The combined survey comprising the items psychological safety and DLOQ items (a total of 28 questions) was then administered to the broader sample of 132 participants. A total of 96 community members accessed the survey, and we ultimately obtained 73 complete and usable data sets, for a final response rate of 55%. Scoring of the data was performed in Qualtrics and validated by AR team members.

Interviews and Focus Groups

Interviews and focus groups were used to provide additional context and interpretive frameworks for the other data sources.

Critical Incident Interviews. I conducted one-on-one critical incident interviews (CIIs) with six key stakeholders from various community contexts (faculty and staff) on campus to identify areas of incongruence. The primary goal of these interviews was to understand areas in which there was perceived incongruence between what the organization espouses and its theory-in-use. These stories gave additional context to the survey data. Interviews were conducted both in person and using an online platform and were recorded and transcribed with the permission of the participants. The transcription software Otter.AI was used, and each transcript summary was member-checked with the respective interviewee for accuracy. The following open-ended interview prompts were used:

- (1) Think about a time when you felt your actions were not consistent with your core values.
- (2) Think about a time when you felt you had done something highly consistent with your core values.
- (3) Think about a time when you did not feel psychologically safe.

Follow-up questions for each of the questions were:

- (a) Describe what happened.
- (b) Who was involved?
- (c) What was your role?
- (d) How did it turn out?
- (e) What made it significant to you?

Community Interviews and Focus Groups. In addition to these CIIs, I conducted seven interviews and two focus groups attended by 11 community members to further explore findings from the quantitative data. During those sessions, we discussed the following questions:

- (1) What are some events, processes, etc., in PUPE that might have led people to score *continuous learning* higher than other items?
- (2) What are some events, processes, etc., in PUPE that might have led people to score *collaboration and team learning* higher than other items?
- (3) What are some events, processes, etc., in PUPE that might have led people to score psychological safety in PUPE as high?

End-of-Project Interviews. Last, I conducted final end-of-project (EOP) interviews with each member of the AR team, where we explored the following questions:

- (1) What have you learned about your ability to achieve value congruence personally?
What would be an example of this?
- (2) What have you learned personally about your degree of psychological safety? What would be an example of this?
- (3) What have you learned about PUPE and its ability as a group to achieve value congruence? What would be an example of this?

- (4) What have you learned about PUPE and its ability to create a psychologically safe culture? What would be an example of this?
- (5) What have you learned about PUPE as a learning organization? What would be an example of this?
- (6) What interactions have you observed among value congruence and psychological safety? Among these and a learning culture?

Assessment

I developed two assessments for use in this project: the Values-Based Self-Assessment (VBSA) and a 360 assessment. Participants rated themselves using these instruments, and I also solicited feedback for personal development purposes as we planned interventions to help participants improve value congruence. During this study, 125 PUPE community members completed the self-assessment and downloaded their personalized learning roadmap.

Data Analysis

For this AR study, I gathered and evaluated both qualitative and quantitative data. Qualitative data for this study included data collected from interviews and reflections from participants and AR team members. The qualitative data gathered through these approaches was organized into thematic categories and analyzed.

Unlike qualitative research, quantitative research explores how numerical variables relate or correlate with one another. Analysis was performed between the dependent variables, value congruence and psychological safety (X), and the independent variable, organizational learning culture (Y). The analysis was conducted using the IBM SPSS software. This data uncovered areas of opportunity that formed the basis of our designed interventions, specifically the VBSA to examine value congruence and numerous facilitated discussions and workshops around

psychological safety. The qualitative and quantitative data in this study played the respective roles of discovery, confirmation (Gall et al., 1996), and, in some aspects, also provided disconfirming perspectives. The quantitative data gathered from the surveys highlighted PUPE areas of opportunity, including *dialogue and inquiry* and *systems to capture and share knowledge*. The qualitative data produced by interviews and focus groups informed interventions such as our information sessions, workshops, the 360 assessment, and coaching. Implementing the data analysis methods outlined in this chapter allowed me to interpret the data necessary to address the research questions of this study.

Ensuring Trustworthiness

This AR project contained three primary elements: “a good story, rigorous reflection on that story and an extrapolation of usable knowledge or theory from the reflection on the story” (Coghlan & Brannick, 2014, p. 16). As Coghlan and Brannick (2014) have suggested, these elements can be solicited by asking three questions in AR: “What happened? How do you make sense of what happened? So what?” (p. 16). Coghlan and Brannick (2014) effectively explained the quality and rigor of action research as being “judged not by the criteria of positivist science, but rather within the criteria of its own terms” (p. 15).

Within any research study, validity and trustworthiness are essential constructs to check. Validity and reliability are ways to understand how sound the methodology is for collecting quantitative data; trustworthiness accomplishes the same goal for qualitative data (Creswell, 2009). This study used both qualitative and quantitative data. Trustworthiness in the qualitative data was addressed by ensuring that interview summaries and transcripts were reviewed and member-checked to capture the essence of the conversations. Confirmability involves establishing that the findings are based on participants’ responses instead of the researcher’s

preconceptions and biases (Creswell, 2002). Analysis of the qualitative data should involve “rigorous reflection” (Coghlan & Brannick, 2014, p. 16) and must attempt to be free of inferences, interpretations, and assumptions. This qualitative data was used to build the good story described as necessary by Coghlan and Brannick (2014). More than merely providing transcripts and summaries, AR storytelling also describes how the researcher is making sense of the story as it unfolds. The participants were given the opportunity to elaborate and/or clarify anything in their data. Selecting highly validated and reliable tools such as the psychological safety survey items by Edmondson (1999, 2018) and the DLOQ (Marsick & Watkins, 1997; Yang et al., 2004) as the basis for the quantitative data collection helped us ensure the reliability and validity of the quantitative elements of the study. These tools are well-known, widely used, and accepted forms of measurement. The AR team members aided in checking this data.

Table 2.2 provides an overview of the strategies this project employed to ensure trustworthiness based on Creswell’s (2009) recommendations.

Table 2.2

Strategies for Ensuring Trustworthiness

Data source	Trustworthiness strategy
Surveys	✓ Triangulation
Interviews	✓ Triangulation
	✓ Reflexivity
	✓ Member checks
	✓ Audit trail
Meeting notes	✓ Audit trail
	✓ Reflexivity
Reflections	✓ Audit trail
	✓ Member checks
	✓ Reflexivity

Researcher notes/journal	✓	Audit trail
	✓	Reflexivity
Subjectivity statement	✓	Reflexivity
Organization documents	✓	Triangulation
	✓	Member checks

To clarify the approaches to trustworthiness in this study, the following definitions of the terms in Table 2.2 are provided. *Triangulation* is a technique to analyze the same study's results using different data collection methods. It is used for three primary purposes: to enhance validity, to create a more in-depth picture of a research problem, and to interrogate different ways of understanding a research problem (Creswell, 2002). *Reflexivity* generally refers to examining one's own beliefs, judgments, and practices during the research process and how these may have influenced the research (Creswell, 2002). *Member checking*, also known as *informant feedback* or *respondent validation*, is a technique used by researchers to help improve the accuracy, credibility, validity, and transferability of a study (Creswell, 2002). An *audit trail* is a qualitative strategy to establish the confirmability of a research study's findings (Creswell, 2002). *Confirmability* involves establishing that the findings are based on participants' responses instead of the researcher's preconceptions and biases (Creswell, 2002).

This study utilized various approaches to ensuring trustworthiness, including member checking and triangulation. Member checks were conducted to allow participants opportunities to provide input and feedback as themes and findings emerged. Coghlan and Brannick (2014) specifically addressed the "three dilemmas" of the insider role within AR: pre-understanding, role duality, and access. The use of member checks in this study was an effective approach to mitigating these dilemmas. I returned data results gathered to participants to check for accuracy

and resonance with their experiences to ensure credibility of results. I involved both the AR team and members of the PUPE staff committee in some of the data collection design and analysis and asked them to member-check interviews and observations; no changes were deemed necessary. This project deployed multiple perspectives and data sources to triangulate the information presented, including follow-up interviews to compare and contrast the data collected in the surveys. Some of the answers provided in the interviews contradicted what was reported in the surveys. For example, many participants struggled when trying to provide specific examples that illustrated the psychological safety or value congruence attested to by the campus culture survey. Triangulation was very useful in this study and helped to address the research questions as I considered the convergence of data from different sources.

Subjectivity Statement

Your project has the capacity to create change, but you can't force people to change.

They must come to it of their own free will. The project could be an utter failure, but I will still finish this program.

Statements like these have fed and, in some ways, helped me detect a significant bias that I hold. Did I really think this project would enact real change in my organization? While I was very excited about my project, I was a bit skeptical. I had to focus our attention on the problem and let the data, theory, and our team's collective brainpower guide us. My goal was that the work of my AR team and our interventions be successful, and I believe we achieved that. However, I also held a deep bias that our organization was unable and unwilling to change for many reasons—some justified, others less so. Change at the individual level was the best that I hoped for. I will admit that my history with the organization informed and fed into these biases.

I had the support of some of the most senior people in the organization, and they were interested in the data I collected. They provided resources in support of these efforts. It also helped that these efforts were connected to statements that have appeared in the past two yearly priorities documents generated by the president of my organization. Given the focus of my study on value congruence, I attempted to lay my biases aside, dug in, and led my AR team ethically. Where I saw incongruence between the words and actions of organizational leadership, I pointed these things out and reconciled them. I actively worked on creating conditions in which I felt psychologically safe to press forward, not just for the sake of my study but also in the attempt to create true positive change in our organization.

I recognized the privilege that I held based on my seniority within the organization. I took extra care to motivate participation out of a desire to improve our organization's culture. In the consent process, I explained that participation in the study would not affect employment or future employee evaluations. My AR team was carefully selected, recognizing that we were all insiders to the organization. We all held personal assumptions and biases that each of us continuously addressed while conducting this research. This was an area in which we were committed to holding each other accountable. We all leaned on one another to ensure that we remained as neutral as possible, followed the data, and considered all ideas appropriately.

Summary

Action research methodology guided this study. Both qualitative and quantitative data collection methods were used with members of the PUPE community and the AR team to answer the research questions. I ensured trustworthiness of the data collection methods as well as the analysis. The results are described in detail in Chapters Three and Four, where I share the results from the data collection and discuss findings and conclusions.

CHAPTER THREE

THE ACTION RESEARCH STORY

The Magic (*Theory of Action*) or the Madness (*Theory-in-Use*) Behind the Curtain!

Chapter Three tells my action research (AR) story, which illustrates an organization's ability to "perform" despite the complexity of an ever-changing environment. The definition of the word *perform* includes not only carrying out a task or function but to "present...to an audience" (Oxford English Dictionary, n.d.). This definition raises the question: Is what is presented to the audience real? If not, what effect does this performance, this magic, this theory of action have on an organization's ability to learn? Throughout this study, I am reminded of a production of *The Wiz* that I was a part of many years ago. So much madness ensued in the months and days leading up to the production and backstage during the production. It actually surprised me when, after the show, my mom told me, "WOW, that may have been the best production I have ever seen!" I was floored! I had just known that the audience could see and feel all the drama that was happening behind the curtain: By opening night, Dorothy and the Cowardly Lion were not speaking to each other, props were breaking, wardrobe pieces were missing, the mics and the lighting would not sync, patience was thin, and attitudes were on edge. It was absolute chaos. However, by the curtain call, it was as if the production's success had created a sense of amnesia. Everyone was hugging (even Dorothy and the Cowardly Lion) and celebrating the success. A similar experience occurred throughout this project. Take this journey with me as we explore the magic (or the madness) behind the curtain. This was a project where the quantitative data told us one thing, and the qualitative data told us another. While there is

often much madness going on, when the curtain comes up, teams seem to fall in line and get the work done.

Chapter Overview

This AR story is told through the lens of a researcher conducting AR within her own organization—learning, growing, and checking her biases along the way. The story begins by introducing the context of the study: a professional development unit within a public research university that is part of an extensive university system and has satellite campuses worldwide. This section also frames the problem of perceived incongruence between our espoused values (what we say) and our theory-in-use (what we do) and whether psychological safety or the lack thereof contributes to value incongruence. I wanted to know: Within our organization, do our theories-in-action contain “defensive routines,” as suggested by Argyris (1985), which are “thoughts and actions used to protect individuals’, groups’, and organizations’ usual way of dealing with reality” (p. 5)? In organizations, such defensive routines are “anti-learning, overprotective, and self-sealing” (Argyris, 1990, p. 25). Through this project, I and the AR team sought to understand how these two concepts, value congruence and psychological safety, affect a learning organization. This chapter continues by telling the research story using the phases of the AR cycle. Three complete AR cycles are described, including assessment, interventions, data collection, and analysis. This chapter concludes with my reflection on the research story.

Context

Pinnacle University (PU) is a pseudonym for a public research university that is part of an extensive university system with satellite campuses worldwide. The school was founded as part of reconstruction plans to build an industrial economy in the post-Civil War southern United States. Initially, it offered only a degree in mechanical engineering. Its curriculum eventually

expanded to include electrical, civil, and chemical engineering. The school evolved from a trade school to a larger and more capable technical and research university. It is organized into six colleges with 31 departments/units emphasizing science and technology. It is well recognized for its computer science and engineering degree programs, with nearly 40,000 students studying in person at the main campus or in satellite locations worldwide and through distance and online learning. Students represent all 50 states and 149 countries. The engineering and computing colleges are among the largest and among the highest-ranked in the nation. The university also offers outstanding programs in business, design, liberal arts, and sciences.

The organization has more than 14,000 employees, including faculty (teaching and research), staff, and numerous affiliates. This study is focused on one academic/business unit within Pinnacle University that offers professional development courses, certificate programs, and online master's degrees to career-focused individuals worldwide in STEM, business, and leadership. This academic/business unit is the work home of 147 faculty and staff members responsible for helping organizations power forward, providing multiple pathways to the world-class offerings at Pinnacle University (PU). This unit is primarily self-sustaining and revenue-generating, which differentiates it somewhat from the largely academic-only units on our campus.

Relevance to the Organization

A 10-year strategic plan, grounded in a new mission statement and nine strategic values, was recently introduced to our campus community due to a change in leadership. This plan was grounded in feedback received via campus culture surveys and comprehensive administrative review (CAR) report feedback. A three-phased approach helped us get where we were at the time of the study: an organization with a newly articulated vision, mission, values, and strategic

themes. The organization spent more than 6 months gathering input from community members during phase one, the visioning phase. Data was collected and analyzed, and drafts of themes began to form. The team used appreciative inquiry techniques to focus on solutions, dreams for the future, and ways to build on organizational strengths. Three questions were asked:

- (1) What makes you most proud to be associated with this organization?
- (2) What was the source of that success?
- (3) What is your biggest dream for this organization by 2030?

These questions were answered by more than 5,700 online and in-person interactions. The data team analyzed and presented the results, which were used to develop drafts of the mission (purpose and actions to serve key stakeholders), vision (impact the organization will have in an ideal world), values (behaviors and practices expected to be consistently demonstrated), and strategic themes (areas of impact).

During phase two, 3 months were spent on goal setting. A strategic analysis was conducted, and goals, objectives, and measurement tactics were developed. Each strategic theme/impact area had a small working group of stakeholders with relevant expertise. Working-group sizes were small enough to meet the deadline yet large enough to ensure inclusion. Members were selected by applying in response to an organization-wide communication, or they were nominated. These working groups leveraged input collected during the visioning phase and identified and analyzed relevant data (trends, performance, outcomes, etc.). They determined gaps between vision and current reality, to address which they developed goal statements to describe the road ahead. Each goal statement had a set of objectives that would be pursued to achieve the goal and quantitative or qualitative metrics for tracking, monitoring, and reporting

progress. After these elements had been adequately vetted and approved, the working groups moved to phase three.

The 3 additional months spent on implementation planning during phase three included specific attention to each layer (university level, unit level). Governance, program, and project management were considered, along with tracking, measuring, and communicating progress and opportunities to refine, revise, and update the plan as necessary. A more detailed gap analysis was conducted, and an agile process was established to review each goal area. Our mission, vision, six strategic focus areas, and nine organizational values were produced with an abundance of care and an eye toward inclusion.

Since then, the mission, vision, six strategic focus areas, and nine organizational values have been rolled out to the campus community. At the onset of this project, we had been living with these values for over a year. We had just completed our community-wide culture survey designed to solicit feedback and establish a baseline for demonstrating the expected behaviors and practices set forth by our values. The feedback helped us identify the areas within our culture where we were succeeding, as well as the areas of opportunity that informed the work of this study.

This AR study focused on a single unit within the large research university described and its ability to positively influence organizational culture within the said unit. We examined the effects of psychological safety on this unit's ability to recognize any disconnects and close the gap between theories-in-use and espoused theory.

Role of the Researcher

I lead the team responsible for the professional development of faculty and staff members on campus. Our team is dedicated to advancing Pinnacle University's mission and community

members' career potential through engaging, applicable learning. We believe that effective individuals and organizations never stop learning, and we are constantly seeking inventive and engaging ways to make that learning convenient and enjoyable. Through my 10+ years of engaging in this work at this organization, I have found disconnects that often span beyond what can be addressed and corrected in a single learning activity. I have had the opportunity to serve on many panels and committees focused on creating culture in our organization. As a campus leader, I felt duty-bound to explore the root cause of the many cultural concerns voiced in the CAR and campus culture surveys and to work with other university leaders to uncover and intervene against the forces that cause our organizational culture to feel stagnant for so many community members. I had the needed influence and an invitation from those at the highest level of the university to explore how we can enable our faculty and staff members to live our values every day. Further, I had the support of my dean to conduct this study within our organization, the Pinnacle University Professional Education unit (PUPE).

Key Stakeholders

This AR project involved three key stakeholder groups: the PUPE unit executive leadership team (ELT), the PUPE staff committee, and the AR team. The ELT provides leadership and oversight of all unit activities and reports directly to the dean of PU. My project sponsor, who is a member of this team, was keenly interested in applying this work inside our unit; she and I kept the dean and the rest of the ELT abreast of the AR project research, journey, and outcomes. At various points during the project, the ELT assisted by actively participating and encouraging the PUPE team to participate in interventions, creating space for the research project to take shape, and helping address any challenges that arose. During one of those early update meetings, the dean of PUPE notified me that a new staff committee had been elected. He

wanted me to consider how we could involve this group in our study. The PUPE staff committee comprises staff members nominated and voted on by PUPE faculty and staff. The committee represents staff to PUPE leadership by recommending proposals to help improve staff culture and engagement, expressing staff issues and concerns, and serving in an advisory role to the dean. This committee acted as a testing ground for us to obtain feedback for our proposed interventions and to create evangelists for the interventions we launched with the larger group. When forming the AR team, I considered members' areas of interest, influence, and ability to commit wholeheartedly to the time needed to support the project for each person I invited. The AR team members (other than myself) are listed, with their assigned pseudonyms, in Table 3.1.

Table 3.1*Action Research Team Members (August 2021 – April 2023)*

Name	Position	Gender	Time in role at PU
Wendy	Assistant Vice Provost <i>Possesses a wealth of knowledge about workplace conflict and the faculty perspective</i>	Woman	13 years
Melanie	Senior Learning Consultant <i>A doctoral student who works with faculty and staff on workplace learning and professional development</i>	Woman	9 years
Burt	Human Resources Director <i>Brought a wealth of HR-related knowledge and a unique liberal arts perspective amid a sea of engineers</i>	Man	11 years
Dan	Director, PU Consulting <i>Leads many campus-wide strategic initiatives and has excellent insight into historical and pipeline initiatives on our campus</i>	Man	7 years
Andrea	Human Resources Manager <i>Has worked in higher education for over 15 years and has a unique perspective. She asks questions well and is a great presenter of disconfirming information.</i>	Woman	15 years

The AR team members remained actively engaged throughout the months we worked together and knew that they could leave the study anytime. They all signed the informed consent form approved by the Institutional Review Board (IRB). The AR team met 11 times from June 2021 through April 2023. These meetings, their timing, and their goals and activities are briefly illustrated in Figure 3.1; a more detailed version is provided in Appendix A.

AR Key Activities June 2021 – April 2023			Color Coding Key	
			Data Collection	
			AR Team Meeting	
			Interventions	
Cycle and Phase	Date	Activity	Activity description	
Prior to Study				
Prior to Study	June 2021	Focus group with potential AR team members	- First gathering of potential AR Team members to introduce/meet everyone and see if they would be interested in serving	
Cycle 1: An Opportunity to Educate				
Cycle 1 Planning Action	August 2021	AR Team Meeting 2	<ul style="list-style-type: none"> - Team building - Celebrated meeting 1st critical milestone - Reviewed AR process and project goals - Explored three key concepts present in the project 	
	August 2021	PUPE staff committee meeting	<ul style="list-style-type: none"> - Reviewed AR process and project goals - Discussed the role they would play in the research project - Explored three key concepts present in the project 	
	August 2021	AR team meeting 3	<ul style="list-style-type: none"> - Decided we needed to level set in the organization and ensure we were all clear on defining key concepts used in the study. 	
	January 2022	AR team meeting 4	<ul style="list-style-type: none"> - Reviewed data gathered this far - Discussed the current state of the organization at large and the effect that may have on PUPE - Begin intervention planning dialogue - Talked about bias and bias identification 	
Cycle 2: An Opportunity to Validate and Innovate				
Cycle 2 Planning Action	February 2022	AR team meeting 5	<ul style="list-style-type: none"> - Team building - Used the AR Team to test the questionnaire construction - Brainstormed ways to engage a high participation rate 	
	March 2022	AR team meeting 6	<ul style="list-style-type: none"> - Team building - Dug into the cycles of action research - Critical incident activity 	
	April 2022	AR team meeting 7	<ul style="list-style-type: none"> - Team building - Reviewed data gathered thus far, including CIT narratives - Drafted a tentative intervention plan. 	
Cycle 2 Evaluation	June 2022	AR team meeting 8	<ul style="list-style-type: none"> - Team building - Reviewed PS/DLOQ data - Confirmed agreement on the intervention plan. 	
Cycle 3: Keeping our Commitments				
Cycle 3 Planning Action	July 2022	AR team meeting 9	<ul style="list-style-type: none"> - Discussed PS/DLOQ quantitative data. - Highlighted that the results were very different from what we expected. 	
Cycle 3 Taking Action	Sept 2022	AR team meeting 10	<ul style="list-style-type: none"> - Reviewed the conflicting quantitative and qualitative data 	
	Oct 2022	AR team meeting 11	<ul style="list-style-type: none"> - Reviewed the conflicting quantitative and qualitative data 	
Cycle 3 Evaluation	March - April 2023	AR team exit interviews	<ul style="list-style-type: none"> - Interviewed all the AR team members individually using a predefined set of questions. 	
	April 2023	Final AR team meeting	<ul style="list-style-type: none"> - Used the five metaphors activity to close out the work for the AR Team. 	

Figure 3.1. Color-Coded Illustration of AR Team Meeting Activities. Note. AR = action research;

PUPE = Pinnacle University Professional Education unit; CIT = critical incident technique; PS =

psychological safety instrument (Edmondson, 1999); DLOQ = Dimensions of Learning

Organizations Questionnaire (Marsick & Watkins, 1999; Yang et al., 2004).

Purpose and Research Questions

The purpose of this AR project was to design, implement, and evaluate interventions that would aid in identifying incongruence between our espoused values (what we say) and our theory-in-use (what we do), as well as to enhance psychological safety within our academic/business unit, PUPE, at our large public research university. The project's goal was to improve the learning culture within PUPE by achieving value congruence through increased psychological safety. The project focused on informing and educating the community about the behaviors necessary to demonstrate our values, determine what elements must be present to ensure congruence, measure how we are doing, and course-correct when necessary. Our underlying assumption was that if we could increase psychological safety, community members would feel free to engage in dialogue about the value incongruence perceived both personally and within the organization. Empowered by powerful discussion tools, knowledge of places of incongruence, and the psychological safety to address these gaps, the academic/business unit could further enhance the organization's learning culture. The research purpose was to explore what can be learned about value congruence and psychological safety and the effect of these concepts on an organizational learning culture.

The research questions that guided this study were as follows:

RQ1: What is learned at the individual, group, and system levels about value congruence and psychological safety, and how do they affect the learning culture within a business unit of a large research university?

RQ2: To what extent is the effect of value congruence and psychological safety linked to the learning culture?

Overview of Action Research

The AR methodology powered the knowledge gained from this study. As described in Chapter 2, this study followed Coghlan and Brannick's (2014) AR methodology, which is a cyclical process in which we examine complex issues and actively work to create solutions, beginning with the prestep of defining context and purpose and then following four basic steps: (1) constructing, (2) planning for action, (3) taking action, and (4) evaluating the action, basing future planning on the outcomes of the action (Coghlan & Brannick, 2014, p. 6).

The story of this AR study is told in the chronological order of the AR cycles as we conducted them. I have named the cycles as follows: Cycle 1, An opportunity to educate; Cycle 2, An opportunity to validate and innovate; and Cycle 3, Keeping our commitments. In any AR project, multiple action research cycles operate concurrently; an overview of the phases and cycles is shown below in Figure 3.2.

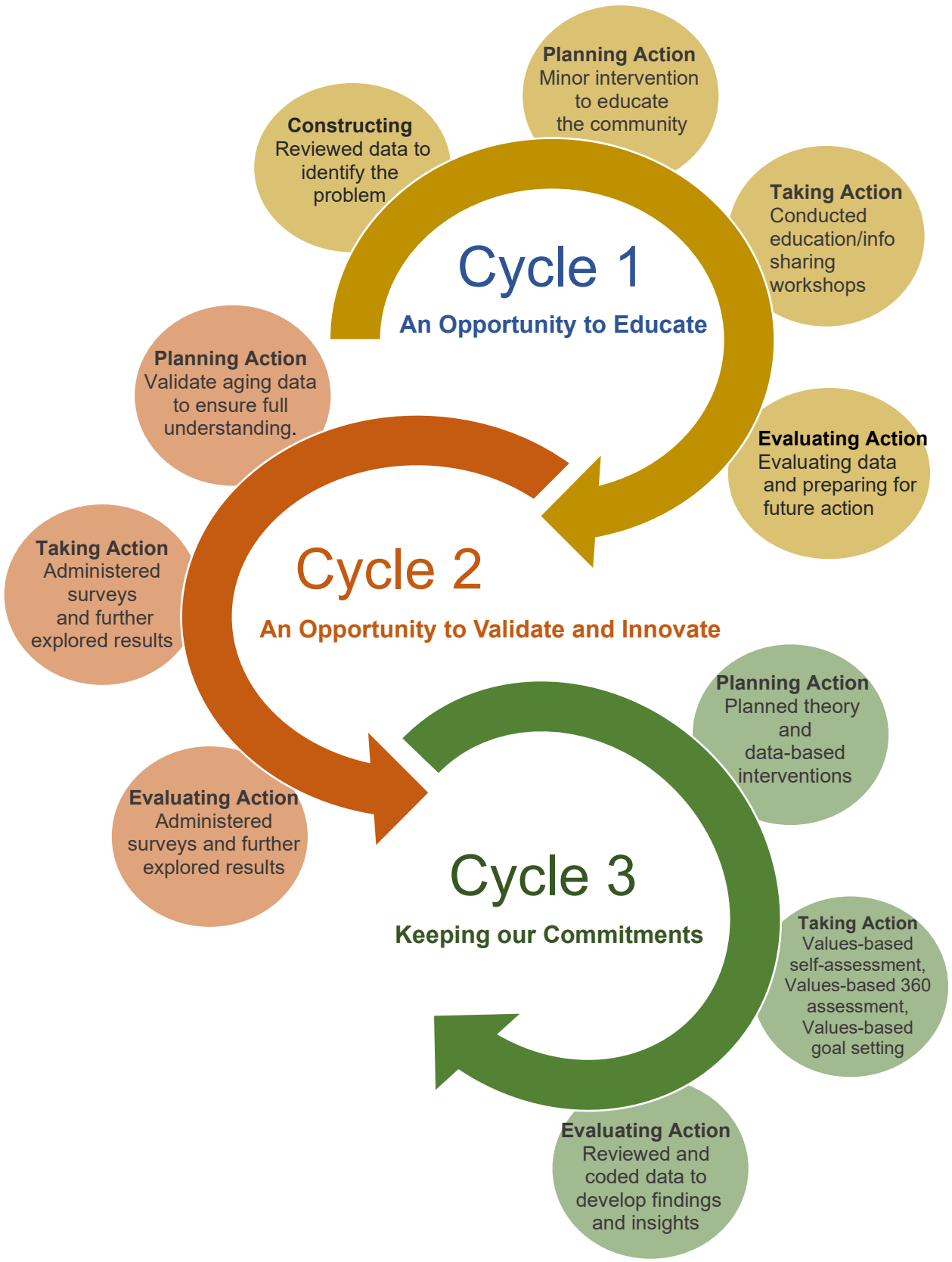


Figure 3.2. Three AR Project Cycles.

Figure 3.3 briefly illustrates the key research activities in each cycle, including data collection, analysis activities, intervention planning, and implementation (see Appendix A for a more detailed version). These activities are described in detail in the following sections of this chapter.

AR Key Activities June 2021 – April 2023			Color Coding Key	
			Data Collection	
			AR Team Meeting	
			Interventions	
Cycle and Phase	Date	Activity	Activity description	
Context & Purpose		Comprehensive administrative review (CAR) and news article review	Collected and evaluated data to support the context and purpose of the study.	
		Organizational Culture Assessment	Reviewed the organization-wide culture assessment; pulled out PUPE data from this assessment.	
Cycle 1: An Opportunity to Educate				
Cycle 1 Constructing		Organization strategic plan	This document included a guiding framework and newly articulated organizational values	
Cycle 1 Taking Action	Sept 2021	Kicked off education campaign (info session with PUPE)	Information session with PUPE Team during Dean's Q&A	
	Sept – Nov 2021	Open enrollment session for the PUPE team	Hosted four Leading our Values Everyday Workshops covering value congruence and psychological safety	
	October 2021	Critical Incident Interviews	Conducted five Critical Incident interviews (CIIS)	
Cycle 1 Evaluation	December 2021	Researcher data analysis	Analyzed workshop evaluations; transcribed Critical Incident Interviews	
Cycle 2: An Opportunity to Validate and Innovate				
Cycle 2 Constructing		Workshop themes	Collected and categorized information gathered during the workshop	
		Level 1 workshop evaluations Quantitative results	Reviewed all workshop evaluations, collected successes and areas for improvement	
		Critical Incident Interview Narratives	Member checked and shared narratives with AR Team	
Cycle 2 Taking Action	May 2022	PUPE town hall meeting	Gave an update on the study, and the dean encouraged participation in the survey	
	May 2022	Launched Psychological Safety (PS) and DLOQ survey	Encouraged members of the team to take the survey.	
	June 2022	Researcher data analysis	Analyzed workshop evaluations; transcribed Critical Incident Interviews	
	June 2022	Conducted interviews	Found that quantitative data looked different than expected. Conducted interviews to gather more information and context.	
Cycle 3: Keeping our Commitments				
Cycle 3 Planning Action	July 2022	Launched values based self-assessment and learning road map	Tool to help community members identify places where their actions are congruent and incongruent with the organization's values.	
	July 2022	Hosted Leading our Values Everyday:	Psychologically safety workshop	

Cycle 3 Taking Action		Psychologically Safety workshop	
	July 2022	Hosted Leading our Values Everyday: Leading Congruently Workshop	Value congruence workshop
	Aug 2022	Interviews	Conducted four interviews to try and further validate findings from the PS/DLOQ survey
	Aug 2022	Focus Group	Conducted focus group with two intact teams and the PUPE Staff Committee

Figure 3.3. *Color-Coded Illustration of Key Research Activities.*

AR Cycle 1: An Opportunity to Educate!

Early in my planning, I conducted a focus group with participants, who were ultimately invited and accepted membership as AR team members. During that initial focus group, we sought to understand the context and purpose of this project, one of the first steps in Coghlan and Brannick's (2019) AR cycle. My perspective on the problem was informed by the results of the organizational culture assessment and other supporting documentation I had been reading. I noticed many themes in the culture assessment data and wanted to explore how to isolate and eliminate workplace discomforts. After much discussion, we generated recommendations and multiple angles to consider. Even though we still had some divergent opinions by the end of the meeting, I had been convinced that my idea was too broad and that it would be more productive to explore ways to navigate workplace discomfort rather than to eliminate it. I gathered additional data, held several individual conversations with focus group participants, and further isolated the organization-wide culture assessment to the results specific to PUPE. These activities revealed a community-wide knowledge gap around how to operationalize the newly articulated organizational values and a need to cultivate a culture of increased psychological safety. With that observation in hand, we began our first work cycle.

AR Cycle 1: Constructing Phase

Once all team members had formally accepted the invitation to serve as members of the AR team, we moved swiftly into the constructing phase, during which our team sought to verify the problem within the local context (Coghlan & Brannick, 2014). However, it was also important that we get to know one another better. I did not want to neglect the human part of this research study nor lose the attention of my AR team members. I did not get the impression that this group was up for hokey exercises, yet team and comradery building was significant to both me as team leader and to the AR process. So, while all team members already knew one another, I found it critical to become reacquainted within the project context, start to set our team norms, and create space for continued open and honest dialogue as we experienced in the initial focus group. I opened this meeting by asking the question. “What makes you feel safe at work?” The dominant themes in their answers are illustrated in the word cloud shown in Figure 3.4.



Figure 3.4. *Word Cloud Illustrating Collective AR Team Answers to “What Makes You Feel Safe at Work?”*

Together, we established the AR team's guiding principles:

- You belong here; we value your opinions and want to hear them, even when they differ from our own.
- We want to innovate; we will challenge each idea with at least two pieces of disconfirming information and resist the status quo.
- We all have brains, which means we all have biases; we will check our own and each other's respectfully.
- Lessons leave, stories stay; this is a safe space to explore and challenge our thinking to learn and grow.

These guiding principles, the agenda, and other documentation relevant to the scheduled meeting were sent out before each AR team meeting. The guiding principles were respected throughout the process and, coupled with team-building activities, aided us in creating a safe space for open and honest dialogue. I encouraged the team members to journal and would send journal prompts with follow-up email messages after each AR team meeting. I constantly reiterated that, just as I was concerned about the AR project itself, this project also offered us an opportunity to reflect on and develop our competencies as leaders of change. In hindsight, I cannot be sure that the level of reflection that I had hoped for was achieved during the early stages of the project, but there was much time left to pivot. With team dynamics beginning to take firmer shape, we began to center our discussions on the relevant data sets we currently had available: the comprehensive administrative report (CAR) results, PU organizational culture assessment results, and a finalized *Guided by Our Values* framework, which is illustrated in Figure 3.5.



Figure 3.5. Guided by Our Values Framework for Pinnacle University.

During one of our early team meetings, it became abundantly clear that we needed to ensure a shared language. Many team members had differing views on the terminology used and were convinced that this would be a challenge for the PUPE team. We raised several questions, including the following: (a) Do you all know the values? (b) In your experience, do the people-leaders you all work with have any concept of what psychological safety is? And (c) In your role as a leader, when is the last time you got detailed feedback on people leadership-related topics? While these questions differed slightly from those that the PUPE staff committee asked, the concerns raised were further validated. During the very first meeting with the PUPE staff committee, staff comments included “I do not know what they [the values] are” and “I am very safe at work, our office suite requires badge access, and our campus police are ever present.” It was unanimously agreed that, to avoid compromising the integrity of the project due to a lack of shared understanding, we would launch an education/information-sharing campaign with the members of the PUPE community to share our organizational values and promote alignment on

concepts like psychological safety, value congruence, and learning organizations, which would be our first intervention to raise awareness.

Table 3.2

Data Collected During Cycle 1 Constructing Phase

Data collection method	Analysis strategy
AR team meeting	Document review
PUPE staff council meeting	Document review
Organizational culture assessment	Document review
Organizational strategic plan	Document review

AR Cycle 1: Planning Action

In the planning phase of this short education/information-sharing cycle, we shared with the PUPE executive leadership team (ELT) the challenges of not having a common language, a lack of widespread awareness of the values, and incomplete understanding of concepts identified during the initial construction phase—concerns that they further validated. They offered their support by yielding space on the agenda at an all-team meeting to introduce this topic. I drafted a brief presentation to be shared during the all-team meeting and developed a 2-hour workshop titled *Leading Congruently: Living Our Values Every Day*. I used the opportunity to speak at the all-team meeting to introduce the concepts and advertise the coming workshops. I also drafted messaging for the dean to encourage all team members to participate, which he did.

Additionally, to gather additional data to help clarify the AR teams' divergent opinions on the overarching problem, I used the critical incident technique (CIT) to conduct several interviews with key community stakeholders. The CIT is a research method for “obtaining rich, qualitative information about significant incidents from observers with firsthand experience,”

who are “asked to recall and describe a time when a behavior, action, or occurrence impacted a specified outcome” (Rosala, 2020, paras. 1–2). The CIT facilitates the gathering of numerous, detailed incidents to understand critical requirements for roles, systems, and processes. John Flanagan formally introduced this method in a paper published in the *Psychological Bulletin* in 1954. The technique was further developed and utilized in numerous studies conducted by Flanagan and fellow psychologists from the US Aviation Psychology Program during the Second World War and, later, by the American Institute for Research and the University of Pittsburgh. I interviewed three key stakeholders using the following questions:

- (a) Think about a time when you felt your actions were not consistent with the university’s core values. Please describe what happened. Who was involved? What was your role? How did it turn out? What made it significant to you?
- (b) Think about a time when you felt you had done something highly consistent with our core values. What happened? Who was involved? What was your role? How did it turn out? What made it significant to you?
- (c) Think about a time when you did not feel psychologically safe. Please describe what happened? Who was involved? What was your role? How did it turn out? What made it significant to you?

Focus groups, critical incident interviews (CIIs), the PUPE ELT, and the PUPE staff committee were the sources used to plan our actions. The idea was to triangulate to reduce bias and help us ensure that our plan was worthy and backed by multiple data sources. From these varied data sources, the themes of learning (knowledge of values; connected to day-to-day activities) and leadership (setting an example for others to follow) emerged and guided the interventions we undertook.

AR Cycle 1: Taking Action

Because this was a short cycle, some would call it a quick win; however, we found that it laid the necessary groundwork before we moved forward with subsequent cycles and interventions. In the taking action phase of AR, the team implemented our data-based interventions (Coghlan & Brannick, 2019). We hosted five different 2-hour workshops, three virtually and two in person, reaching a total of 64 participants, which accounted for 43.57% of the PUPE team. These workshops provided an overview of the organization's values, introduced the importance of psychological safety, and provided strategies to foster a psychologically safe, values-based culture by using scenarios to apply the strategies while identifying potential challenges.

I took great care to create a welcoming environment, whether the workshop was held in person or online. Each participant was greeted by name. I curated an upbeat playlist that most seemed to enjoy. We opened each workshop with introductions and repeated "Vegas rules": what happens in the workshop stays in the workshop. If participants were delayed or arrived once introductions had begun, they were rescheduled for the next session. These special considerations were made to protect and build community and a safe space for participants to engage deeply in these topics.

The sessions were not mandatory but were strongly encouraged. In addition to the content covered, we built in some introspection by posing questions such as the following:

- (a) Have you ever refrained from sharing your ideas or thoughts at work because you were worried about how people might react?
- (b) Do you ever feel like others are holding back their ideas? If so, why do you think this happens?

- (c) What is the impact when you or your colleagues feel unsafe sharing their insights, ideas, opinions, and lessons learned?

We grounded all the discussions in our nine organizational values, which we also introduced during the workshop. We shared three key strategies: vulnerability, crucial conversations, and trauma-informed leadership, to promote psychological safety and uphold organizational values.

Scenarios – Psychological Safety

a) *How is psychological safety relevant in this situation?*
 b) *How can vulnerability, crucial conversations, and trauma-informed leadership be applied in this situation?*
Reflect Individually – Discuss at Your Table – Share ONE Key “Ah-ha” with Everyone

<p>Scenario 1: A member of your group has recently been missing deadlines, submitting work with errors and has periods of time they are unaccounted for. When they are present, they seem irritable and annoyed by others around them. You do not have any information about what might be going on with them.</p>	<p>Scenario 2: As part of promoting the PUPE values, you have communicated to your group that Wellbeing is a priority. Members of your group have challenged you that the current workload demands and expectations to return to campus are incongruent with that value.</p>
<p>Scenario 3: You are a new leader of a group that has experienced a history of conflict, lack of trust, and a former leader who withheld information that impacted them. You want to move forward with new ideas but many group members keep returning to the failures and painful experiences of the past.</p>	<p>Scenario 4: Your group is comprised of people from diverse cultural and experiential backgrounds. One member of the group has raised concerns that members of the group have privately expressed concerns about perceived preferential treatment for some members of the group. They indicated that it is impacting morale within the group.</p>

Figure 3.6. *Sample Workshop Scenarios.*

We rounded out the discussion with an exercise where participants discussed the enablers (What conditions enable you to live our values every day?), the challenges (What are the constraints that make living our values every day challenging?), and the needs (What do you need from Pinnacle University to live our values every day?). The responses fell into three themes across the questions: learning, leadership, and resources. Some illustrative examples are provided in Table 3.3.

Table 3.3*Themes from the Living Our Values Every Day Workshops*

Enablers	Challenges	Needs
<i>Learning</i>		
Professional development opportunities like this	Community members are not skilled in respectful pushing back (especially on people with authority)	Accountability measures when we are not living our values
<i>Leadership</i>		
Supportive leadership	Lack of clear direction and the ability to say no	Strong examples in leadership
<i>Resources</i>		
Investment/Prioritizing projects that are aligned with and in support of our values and deprioritizing those activities that are not aligned	Scarcity of resources (people, tools, time, and capital)	Increased budgets that match increased enrollment and increased workload as we serve our students

The CIT interviews highlighted value congruence and psychological safety within the context of my AR project. The interviews contextualized many things I thought were true; for example, most staff have had moments where they did not feel psychologically safe to fully express their viewpoints. The interviews also uncovered additional layers and nuances I had not considered, such as the relationship between parity and privilege as it relates to psychological safety. After the CIT interviews were conducted and transcribed, I created narratives using the participants' own words. I validated these narratives through member checking by sharing them with the participants to ensure clarity and that I had not misrepresented their thoughts. Table 3.4 provides representative quotations from those CIT interviews that align with each category.

Table 3.4*Representative CIT Interview Examples*

Category	Example
Learning	<i>“If these values are a door to a conversation, then we need to teach people to have a conversation”</i>
Leadership	<i>“Tenured faculty rank and a lucrative research agenda, I am privileged; tenure means something. So many do not have that privilege. I want to make sure I leave the door open for others”</i>
Resources	<i>“These types of transformations don’t just happen, organizations have to provide sustained resources, individuals have to buy in and both have to understand that these things take time.”</i>

AR Cycle 1: Evaluating Action

The final phase in the AR cycle is the evaluating phase (Coghlan & Brannick, 2019). In this phase, the AR team analyzed data collected during and after the intervention to discover what was learned. This analysis informed our next steps and further interventions. Table 3.5 summarizes the data sources used in evaluating our intervention.

Table 3.5*Intervention Evaluation Data Sources*

Dates	Data collection method
Sept–Nov 2021	Level 1 workshop evaluation
Sept–Nov 2021	Workshop collateral
October 2021	Critical incident interviews

Highlights from some of the data sets are shared in this section. Following each workshop, each of the 65 participants was encouraged to complete the level-1 reaction survey, administered via Qualtrics, that assessed participants' feelings and immediate perception of the quality and usefulness of the workshop (Kirkpatrick & Kirkpatrick, 2006).

Table 3.6

Summary of Quantitative Results for Level-1 Workshop Evaluation Survey

N = 53 Evaluations Received from Workshop Participants

<p>The instructor was able to present the subject matter in a way that was easily understood.</p> <ul style="list-style-type: none"> • Strongly Agree – 99% • Agree – 1% • Neutral – 0% • Disagree – 0% • Strongly Disagree – 0% 	<p>The instructor's pace of presenting the subject matter was appropriate.</p> <ul style="list-style-type: none"> • Strongly Agree – 99% • Agree – 1% • Neutral – 0% • Disagree – 0% • Strongly Disagree – 0%
<p>On a scale from 0–10 (10 being the highest), how likely are you to recommend this workshop to a colleague?</p> <ul style="list-style-type: none"> • 5–10 – 100% • 1–5 – 0% 	<p>The workshop met your expectations.</p> <ul style="list-style-type: none"> • Strongly Agree – 94% • Agree – 6% • Neutral – 0% • Disagree – 0% • Strongly Disagree – 0%
<p>The workshop content was appropriate and presented in a structured manner.</p> <ul style="list-style-type: none"> • Strongly Agree – 100% • Agree – 0% • Neutral – 0% • Disagree – 0% • Strongly Disagree – 0% 	<p>The workshop content was applicable and understandable.</p> <ul style="list-style-type: none"> • Strongly Agree – 100% • Agree – 0% • Neutral – 0% • Disagree – 0% • Strongly Disagree – 0%
<p>The workshop has improved my knowledge of the subject.</p> <ul style="list-style-type: none"> • Strongly Agree – 100% • Agree – 0% • Neutral – 0% 	<p>The duration of the course was appropriate.</p> <ul style="list-style-type: none"> • Strongly Agree – 94% • Agree – 3% • Neutral – 34% • Disagree – 0%

• Disagree – 0%

• Strongly Disagree – 0%

During the workshops, we uncovered themes that reinforced our belief that more communication and education on this topic was necessary and validated themes we had previously heard. This work provided ideas for interventions and support as we proceeded with this study. Examples from these responses are provided in Table 3.7.

Table 3.7

Examples of Themes from Level-1 Workshop

Prompting question	Example responses	Theme
What events, processes, etc., here at Pinnacle have you seen that foster living our values every day?	<i>I do see the language of leading with our values every day, expressed more campus-wide by various departments</i>	Learning
	<i>Professional Development and Well Being Activities</i>	Learning/Resources
What are some events, processes, etc., here at Pinnacle that we should discontinue to further a culture of leading with our values every day?	<i>Allowing leaders to figure it out independently, we should ensure everyone who leads others should engage in this dialogue.</i>	Leadership
	<i>While something does come to mind, I think it is best not to say it right now or through this platform.</i>	
What events, processes, etc., are missing here at Pinnacle that we should implement to further a culture of leading with our values every day?	<i>We have no org-wide accountability. What happens when an environment is known not to live our values or be psychologically safe? Nothing.</i>	Accountability
	<i>A robust performance management system.</i>	Resources

Prompting question	Example responses	Theme
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Participants in these workshops provided positive comments about the experience and expressed their interest in learning more. One participant commented,

This particular training, for me, was a new but helpful concept (an additional layer in understanding and approaching [Pinnacle] values), so it will take some time and practice to process it and fully understand. With that, I appreciate our instructor's sensitivity, encouraging us to practice what was taught and use opportunities to apply the training.

Another stated, *"I would love it if this session was mandatory; everyone should have to take it for a little longer length to have more time for additional conversation."* Yet another participant responded, *"Great session and an even better dialogue with it. I would love more opportunities to go into this topic and gain more detail about the areas we need to improve."*

We noticed that what some groups defined as *enablers* were perceived by others as *needs*. Overall, the participants were engaged and participated, and the evaluations suggested positive perceptions of the workshop. However, it was clear that some people did not feel comfortable engaging in dialogue about this topic, even though that feeling was not reflected in the evaluation data. Perhaps the discomfort was localized to the 12 participants who did not submit a level-1 evaluation.

In summary, my goal as a facilitator in this research phase was to introduce some members of the PU community to the Pinnacle values and acquaint others, as well as to gather additional insights via the critical incident interviews. As discussed above, I took pains to ensure

a safe and welcoming workshop environment. Based on the survey feedback, we largely achieved this goal despite the apprehension of a few participants. Initially, I zeroed in during my reflection on the person who had responded that they did not want to share their feedback via the survey. Overall, however, I believed this cycle to be complete and felt equipped with data and lessons learned to begin a new cycle of planning, acting, and evaluating. The lessons learned included that (a) there will be a small percentage of people who will remain loyal to their divergent opinion no matter what you do; (b) it is important to introduce concepts and curate space for participants to practice and engage in the content in a way that is most meaningful to them; and (c) with deliberate attention, engagement can be achieved, whether online or in person.

To close out this cycle, I gathered and shared all the data with the AR team to consider how we should proceed with our next interventions.

AR Cycle 2: An Opportunity to Validate and Innovate

With the education campaign behind us, the second research cycle found us with a data set for PUPE that the AR team did not feel fully represented the unit. The data from the campus-wide organizational assessment had aged and represented only 45 responses—approximately 29% of the organization. In addition to our highly fluid work environment, the project occurred during a time coined “the great resignation” (Mearian, 2023, p. 2), which began around April 2021, with more than 4 million US workers quitting their jobs every month. Questions emerged such as *Has the campus community changed through attrition? Does this data set give us current and accurate insights into the segment of the campus community we have chosen for this study?* We determined that we needed additional data specific to the population with whom we planned

to intervene. For easy reference, Figures 3.7, 3.8 and 3.9 illustrate the qualitative insights gleaned from the PUPE extracts from the campus-wide culture survey data.

Engagement & Psychological Safety

Engagement & Psychological Safety**									
Unit	I am clear about how my role contributes to the priorities of the University.	I engage in learning and development opportunities at PU.	I feel a strong sense of belonging to PU.	I feel inspired by the mission of PU.	I would recommend PU to family or friends as a great place to learn.	I would recommend PU to family or friends as a great place to work.	I feel safe bringing up problems and tough issues.	I feel safe expressing points of view that are different from my colleagues/classmates.	I feel safe to ask questions or raise concerns w/ my leader/instructor.
Pinnacle University Overall	3.34	3.18	2.99	3.20	3.54	3.06	2.81	2.79	3.09
Provost & Executive Vice President for Academic Affairs	3.28	3.16	2.86	3.08	3.43	2.91	2.66	2.69	2.99
Pinnacle University Professional Education	3.23	3.24	3.00	3.21	3.74	3.00	2.74	2.72	3.07

** Answers were on a 4 point scale: Strongly Agree, Somewhat Agree, Somewhat Disagree, Strongly Disagree

Figure 3.7. PUPE Extracts From Campus-Wide Culture Survey Data: Engagement and Psychological Safety.

Values (Observations)

Unit	n	Staff (%)	Faculty (%)
Pinnacle University Overall	1866	57.5%	42.5%
Provost & Executive Vice President for Academic Affairs	764	51.2%	48.8%
Pinnacle University Professional Education	45	86.7%	13.3%

Unit	Values*								
	Students Top Priority	Act Ethically	Responsible Stewards	Celebrate Collaboration	We Champion Innovation	Nurture Well-Being	Safeguard Freedom of Inquiry	Strive for Excellence	Diversity
Pinnacle University Overall	4.07	4.15	4.08	3.87	4.07	3.56	3.69	4.27	3.80
Provost & Executive Vice President for Academic Affairs	4.10	4.00	3.94	3.78	4.02	3.38	3.55	4.18	3.66
Pinnacle University Professional Education	4.39	4.23	4.18	4.00	4.14	3.82	3.91	4.27	3.98

* Answers were on a 5-point scale: Always, Often, Sometimes, Rarely, Never

Figure 3.8. PUBE Extracts From Campus-Wide Culture Survey Data: Values (Observations).

Qualitative Insights

Pinnacle University Professional Education		100%
My best advice for improving culture:		32%
Better divisional and departmental leadership practices		8%
Opportunities for work-life balance		8%
Continue stressing and embracing diversity and equity		3%
Elevating, recognizing, and compensating the GOOD		3%
Fairness in making decisions		3%
Focus on professional development		3%
Improve resource and people management		3%
Inconsistent leadership practices and focus		3%
Policies, processes, or procedures that prevent living out values:		49%
Increases in pay and opportunities		16%
Disparities between faculty and staff		14%
Changing expectations, culture, and work		11%
Administrative policies, practices, and priorities		5%
Hiring practices		3%
What I appreciate most about culture:		19%
Smart, good, and creative people		8%
Innovative, collaborative, and diverse culture		5%
Appreciation for innovation		3%
Innovative and impactful research		3%

Figure 3.9. *PUPE Extracts From Campus-Wide Culture Survey Data: Qualitative Insights.*

AR Cycle 2: Constructing

Our first cycle uncovered an educational opportunity that the AR team found it prudent to address right away. As we entered cycle 2, it was essential to re-ground ourselves in the literature and refocus on the problem we wanted to address. I held a meeting in which I provided more information about AR and presented the data that I had collected, along with the theoretical framework grounding this study. We agreed on a statement of the problem that we hoped to tackle by examining and discussing this information: *How do we inform and educate the community about the behaviors necessary to demonstrate our values, determine what elements must be present to ensure congruence, measure how we are doing, and course-correct with interventions?* This study was meant to affect meaningful change within my organization and contribute to the body of knowledge on this topic.

No matter how strong a strategic plan is, community members will hinder its efficacy if they do not share cultural values among themselves and with the organization. It was our goal to create a strong, values-based culture. Our organizational values are meant to unite our community in shared beliefs, assumptions, and expectations for how we interact and carry out our work. Organizational values are at the heart of our organizational culture and are how we will deliver our mission, pursue our vision, and, ultimately, achieve our goals. During this cycle of work, we explored what was needed to discover organizational and personal areas of incongruence. We designed and implemented interventions designed to close the gap between our espoused values and our theory-in-use, which is foundational to strategy execution and culture alignment. Leaders play a uniquely important role in modeling behaviors congruent with our organizational values; they are also responsible for creating and cultivating a psychologically

safe environment that allows others to point out actions and behaviors that appear incongruent with our values. Everyone has a role to play in nurturing and reinforcing our values.

AR Cycle 2: Planning Action

During this phase, the AR team decided that we had to ascertain where PUPE specifically was in relation to psychological safety, value congruence, and learning culture. We did not want to start to intervene without a baseline, or we would not necessarily know whether the planned interventions had been meaningful. While we had the PUPE pullouts from the PU organization-wide culture survey, the low response rate coupled with the age of the data gave us pause. We decided that the next best step was to leverage two highly validated survey instruments: the Dimensions of the Learning Organization Questionnaire (DLOQ) (Marsick & Watkins, 1999; Yang et al., 2004) and the psychological safety survey (Edmondson, 1999, 2018). Both have been validated in numerous contexts and demonstrated adequate construct validity and reliability to measure learning organization culture and psychological safety. To increase reliability, the AR team reviewed the questions and completed the combined questionnaire before we administered it to the broader PUPE audience.

AR Cycle 2: Taking Action

Fortuitously, each unit at PU had been charged with developing an action plan based on the specific data about its unit from the organization-wide culture survey. This charge came from the president's office and captured my dean's immediate attention. This action plan was mentioned during a check-in on the AR project with my project sponsor and the executive leadership team in which I shared the AR team's concerns about the existing data. I advocated for us to collect more data and create interventions that would be meaningful for our unit while at the same time fulfilling the requirement to submit this action plan. With the ELT's support, I

announced the survey during an all-team town hall meeting and launched the survey. The survey included human subjects permission disclosures as required by IRB and was sent to 132 participants. Of these, 96 people started the survey and answered some questions, but only 73 complete and usable responses were ultimately received, representing a 55% response rate—encouragingly, a significantly higher proportion than the 29% on the previously administered organizational culture survey.

AR Cycle 2: Evaluating Action

Inquiring into one's own organization presents challenges that differentiate this research process from studying an organization as an outsider (Evered & Louis, 1981). My goal was to view the data obtained in cycle 2 from the “high ground” (Schön, 1995) in contrast to being immersed in the “swampy lowland” (Coghlan & Brannick, 2014). As I reviewed the data, which in many ways did not support my experiences or hypothesis, I found myself checking and double-checking my bias as I found myself immersed in the swampy lowlands. Despite my uncertainty, I stayed the course as we must with critically important issues, such as how to generate whatever changes we wish to see (Coghlan & Brannick, 2019, p. 4).

Psychological Safety

In contrast to our expectations, the data from the quantitative survey reflected that PUPE was psychologically safe. The total mean score on the 5-point scale was 3.62. In contrast, the total mean score for the AR team's responses to this survey was 3.25, with three of the questions indicating areas of opportunity. The most significant disparities between the AR team responses and the PUPE community occurred for the following questions:

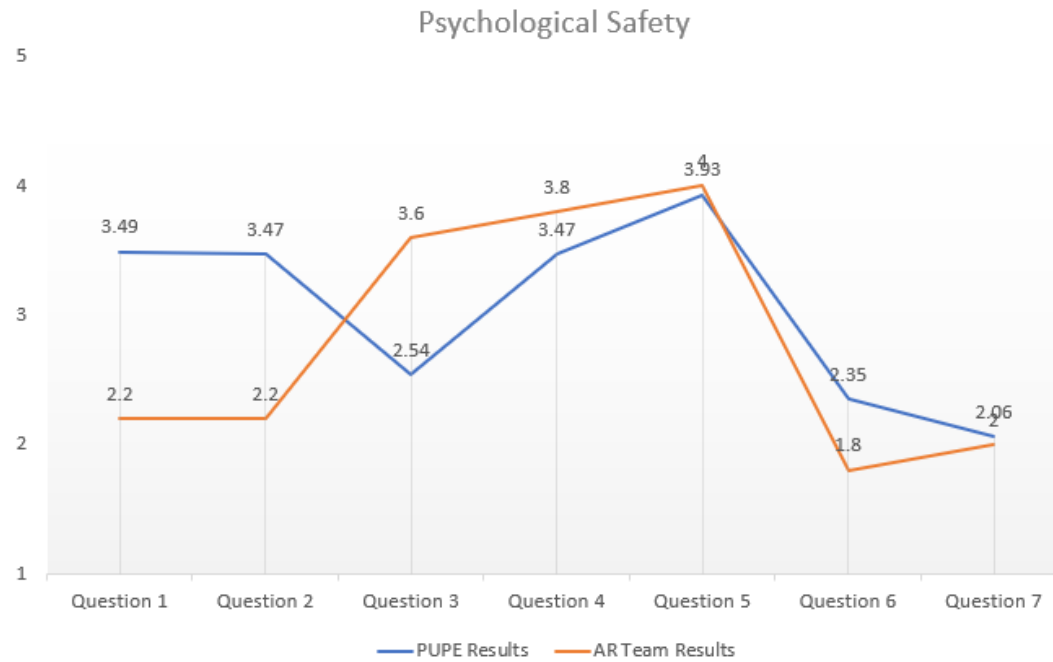
Q1. People in PUPE are able to bring up problems and tough issues.

Q2. I feel safe to take a risk in PUPE.

Q3. It is difficult to ask other members of PUPE for help.

The quantitative data for the Psychological Safety survey are provided in Figure 3.10.

- (Question 1)**
People in PUPE are able to bring up problems and tough issues..
- (Question 2)**
I feel safe to take a risk in PUPE.
- (Question 3)**
It is difficult to ask other members of PUPE for help.
- (Question 4)**
No one in PUPE would deliberately act in a way that undermines my efforts.
- (Question 5)**
Working with members of PUPE, my unique skills and talents are valued and utilized.
- (Question 6)**
If I make a mistake in PUPE, it is often held against me.
- (Question 7)**
People in PUPE sometimes reject others for being different.

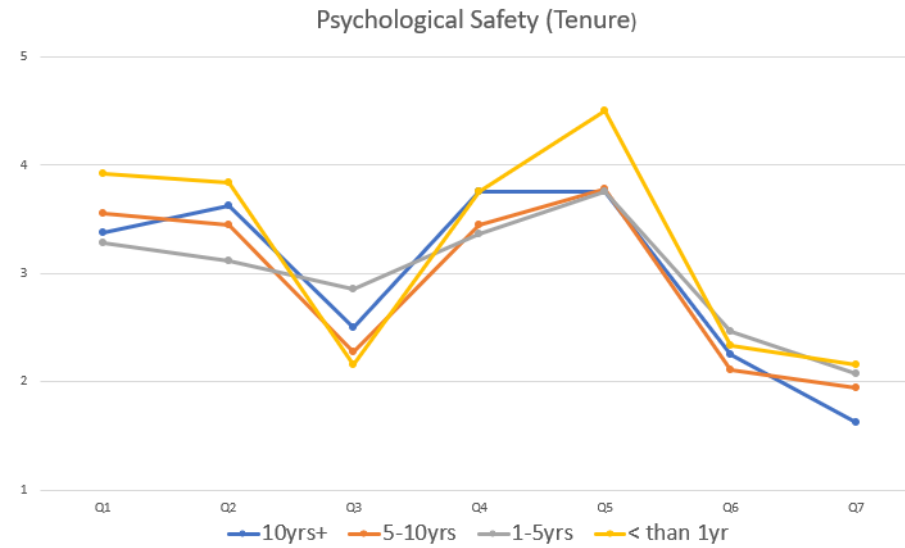


(5) Strongly Agree (4) Somewhat Agree (3) Neither Agree nor Disagree (2) Somewhat disagree (1) Strongly Disagree

Figure 3.10. *PUPE Psychological Safety Survey Quantitative Data.*

When investigating these findings further via interviews and focus groups, I asked participants what practices are currently in place that create a feeling of psychological safety. The qualitative data (i.e., transcripts of these interviews and focus groups) revealed several thought-provoking elements. Seven of the 14 respondents mentioned pop-in and the biweekly Q&A meetings hosted by the dean. Of those seven, two further mentioned that while these venues are available, they are rarely used and are largely ineffective. Throughout the 16 months that we were engaged in this study, a total of four questions were submitted to pop-in. Another interesting response from a focus group participant was, *“Everybody says, Speak up, and they have an open-door policy.”* When asked further about how many open-door, speak-up conversations they have had, the participant clarified: *“Well, I haven’t had any; I work from home and haven’t even been to campus in the year and a half that I have worked here. I haven’t had the need, but I’m sure they are likely happening.”* Over the past 3 years, 60%–70% of the staff have worked remotely. Gone are the days of just stopping by to chat; more intentionality is required to have those conversations. These comments took me back to the quantitative data to evaluate any relationship between psychological safety and the length of time that participants have been members of the Pinnacle University community. Interestingly, the data showed that those who have been a part of the PUPE community the longest (10+ years) and those who are new (< 1 year) reported feeling the safest to take risks (see Figure 3.11 for details).

- (Question 1)**
People in PUPE are able to bring up problems and tough issues..
- (Question 2)**
I feel safe to take a risk in PUPE.
- (Question 3)**
It is difficult to ask other members of PUPE for help.
- (Question 4)**
No one in PUPE would deliberately act in a way that undermines my efforts.
- (Question 5)**
Working with members of PUPE, my unique skills and talents are valued and utilized.
- (Question 6)**
If I make a mistake in PUPE, it is often held against me.
- (Question 7)**
People in PUPE sometimes reject others for being different.



(5) Strongly Agree (4) Somewhat Agree (3) Neither Agree nor Disagree (2) Somewhat disagree (1) Strongly Disagree

Figure 3.11. *PUPE Psychological Safety Quantitative Data (Tenure).*

Two themes from the critical incident interviews that were further validated during subsequent interviews and focus groups were *parity* and *privilege*. The Oxford English Dictionary (n.d.) defines parity as “the state or condition of being equal,” especially regarding “equivalence of pay for jobs or categories of work perceived as being comparable.” Privilege is a “right, advantage, or immunity granted to enjoyed by an individual, corporation of individuals, etc., beyond the usual rights or advantages of others” (Oxford English Dictionary, n.d.). Much has written in the scholarly literature about gender parity in the workplace, but I found very little correlating parity and privilege with psychological safety. Through interviews and focus group discussions, I learned that positional power and privilege seem to correlate with higher perceived psychological safety. As one focus group participant, FGP7, said,

Psychological safety comes and goes for me. It really depends on the rooms I’m in and my perceived status among those with me. It has less to do with my title and more with how I perceive my level of influence with the group assembled.

Value Congruence

The interviews and focus groups revealed a lack of widespread knowledge of the organization’s articulated values (hence the actions detailed in cycle 1). Before administering the combined questionnaire, we aimed to ensure that participants were aware of the articulated organizational values that we would refer to in the questionnaire and subsequent interventions.

Strategic leadership was a dimension in the DLOQ developed by Marsick and Watkins (1999), from which our survey drew multiple items. The item “PUPE leaders ensure that the organization’s actions are consistent with its values,” adapted from the DLOQ, was considered individually due to its significance and relevance to our study. The average score (on a 6-point scale) for this item was 3.73 for our survey respondents, whereas it was 3.6 for the AR team.

While the strategic leadership dimension was not the lowest or the highest for PUPE, the responses indicated that participants believe that leaders' actions are generally consistent with the organizational values. Figure 3.12 provides an overview of the median scores for all dimensions of the DLOQ considered in our survey.

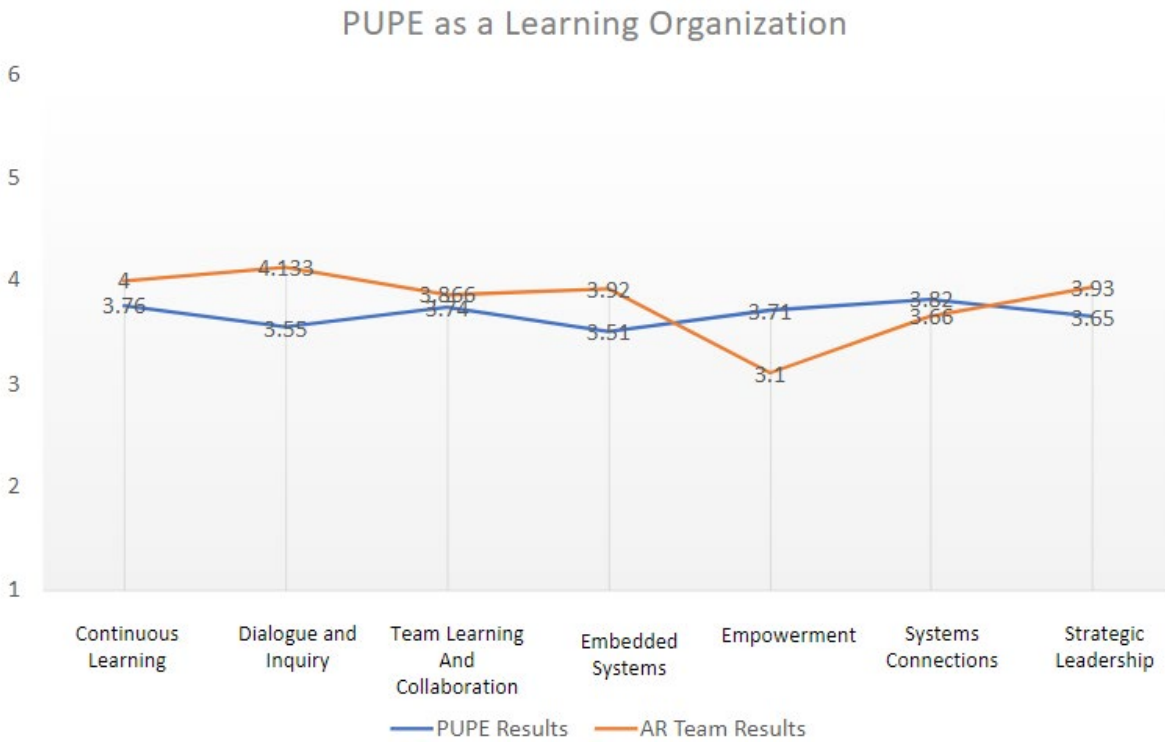


Figure 3.12. Median Scores for PUPE as a Learning Organization.

While PUPE is slightly above average as a learning organization, there was a slight dip in scores for the DLOQ dimensions of *dialogue and inquiry* (DI) and *embedded systems* (ES) to *capture and share learning*. Tables 3.8 and 3.9 show the items on our survey that received the lowest scores for each of these dimensions.

Table 3.8

Lowest-Scoring Items for Dialogue and Inquiry Dimension

Dimension: Promote Dialogue & Inquiry People gain productive reasoning skills to express their views, and the capacity to listen and inquire into the views of others; the culture is changed to support questioning, feedback, and experimentation.	
Item	Mean Score
In PUPE, people spend time building trust with each other.	3.46
In PUPE, whenever people state their views, they also ask what others think.	3.59

Table 3.9

Lowest-Scoring Items for Embedded Systems Dimension

Dimension: Create Embedded Systems to Capture and Share Learning Both high and low-technology systems to share learning are created and integrated with work; access is provided, and systems are maintained.	
Item	Mean Score
PUPE creates systems to measure gaps between current and expected performance.	3.51
PUPE makes its lessons learned available to all employees.	3.35
PUPE measures the results of the time and resources spent on training.	3.19

We explored the quantitative data from the DLOQ (Marsick & Watkins, 1999; Yang et al., 2004) during the AR team meetings and participant interviews. When asked what events, processes, etc., in PUPE might have led people to score lower in DI than other items, most

participants had no answer, and those who responded noted “*a lack of trust*” and “*a lack of organizational vision*” as areas of opportunity. We also asked the same question regarding ES. Respondents noted experiencing a “*CYA*” or “*every team for themselves culture*”; another respondent mentioned, “*In PUPE, technology drives the business often without a healthy respect for business process understanding.*” When participants were asked how they themselves might be contributing to the problem, most had a hard time answering. Considering Argyris and Schön’s (1978) thoughts around the disconnect between espoused theory and theory-in-use, we were not surprised by these responses.

In summary, the responses we received to our questionnaire prompted us to examine this quantitative data more closely. We sought to deepen our understanding of the collective responses and validate them with additional evidence through interviews and other data-gathering techniques. Ultimately, we could not reconcile the quantitative data gathered through the survey with the qualitative responses from the interviews and the focus groups. We also spent considerable time checking our assumptions, taking an objective look at the organization’s landscape, and examining any biases we may have had based on our lived experiences. The AR team members also discussed “Campbell’s Law,” named for social scientist Donald T. Campbell, which states that if decisions are made as a result of a metric or measurement, it may incentivize people to alter the measurement and/or responses, accordingly skewing the results (Laubheimer & Moran, 2021). We also discussed sampling bias, where only people who feel safe to complete the survey do so, also potentially distorting the results (Psychological Safety, 2020).

AR Cycle 3: Keeping Our Commitments

This third and final AR cycle focused on taking the data we had gathered and implementing interventions driven by that data to keep our commitments to PUPE. Because the

quantitative data presented differently than we had expected, it was vital that we triangulate the data. First, we conducted quantitative surveys to measure the levels of psychological safety, value congruence, and where PUPE scored as a learning organization. Second, we conducted focus groups to dig deeper into the quantitative results, thus allowing us to obtain a more nuanced understanding of the data and support our findings with another data source. Third, we conducted interviews with core groups within PUPE who have lived experiences with the organization to obtain their perspective. One exciting point was that even though the questionnaire results indicated relatively good scores for the levels of psychological safety and value congruence perceived in the organization, participants were excited about the interventions and reported on several occasions how much the activities proposed are needed in PUPE. Key actions in this 8-month phase, which lasted from June 2022 to February 2023, included providing resources, building relationships, and final data collection.

Cycle 3: Planning Action

The AR team diligently planned and prioritized interventions based on the theory and data collected. We have learned that it is essential for members of an organization to share the same values, the definition of those values, and the expected behaviors. According to Argyris and Schön (1974), individuals and organizations maintain theories of action that they have developed about and for themselves. These theories “typically include an espoused theory of action and a theory-in-use; furthermore, the individual may or may not be aware of the incompatibility of the two theories” (Argyris & Schön, 1974, p. 7).

Values-Based Self-Assessment Tool

Informed by this assertion that individuals may experience personal difficulty with identifying potential incongruencies in both themselves and their organization, we created the

Values-Based Self-Assessment (VBSA) tool. The VBSA provides community members with an opportunity to answer a series of questions in different ways to find the most consistent answers, which can help them identify the values in which they have strengths and the values that are areas of opportunity. The questions are based on behaviors identified as matching each value and are presented in various ways. The assessment is scored based on the consistency of the answers, no matter how the question was presented. Once participants answer all the assessment questions, they are provided with a “learning roadmap,” based on their responses, which offers resources and learning opportunities to support community members as they navigate their areas of opportunity and increase their proficiency in aligning their actions with the organization’s values. Sharing this learning roadmap was designed to assist in growing the competencies and skills based on Pinnacle’s organizational values as we strive to live our values every day and eliminate value incongruence at the individual level. A sample learning roadmap is illustrated in Figure 3.13.

The Values Assessment Tool and Values-Based Learning Roadmap

This report provides you with a personalized values-based learning roadmap related to Pinnacle's values to identify your top strength and three areas of growth.

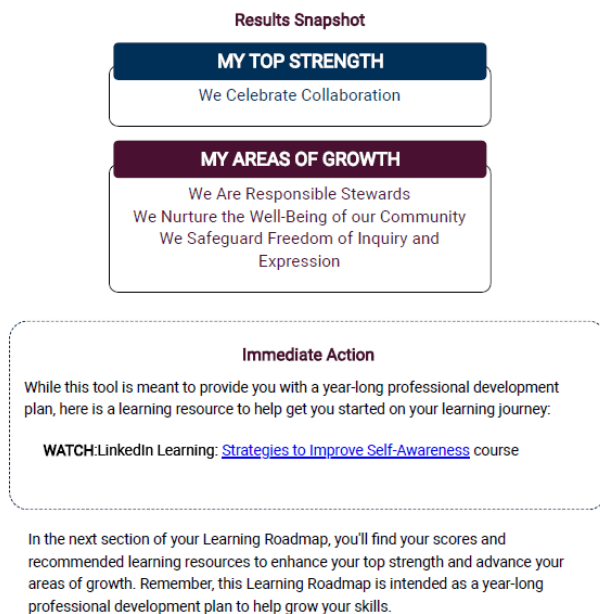


Figure 3.13. *Sample Learning Roadmap.*

During our AR team meeting, these activities felt necessary but highly tactical. The follow-on question had to do with how we continue to cultivate a psychologically safe environment and help community members operationalize the learning roadmap. One additional theme we encountered that had not been addressed was *accountability*. We contacted our campus partners to discuss how we could incorporate some accountability into our performance management activities. However, as one focus group participant voiced, “*You can do all the workshops you want, but if there is no way to hold folks accountable when they are not behaving in alignment with our values, all your work will be in vain.*”

Cycle 3: Taking Action

During this final AR cycle, we implemented three interventions:

- (1) The VBSA and learning roadmap
- (2) Two redesigned workshops: *Leading Our Values Every Day: Psychological Safety* and *Leading Our Values Every Day: Leading Congruently*
- (3) The values-based 360 assessment and coaching sessions

These interventions are described in Figure 3.14.

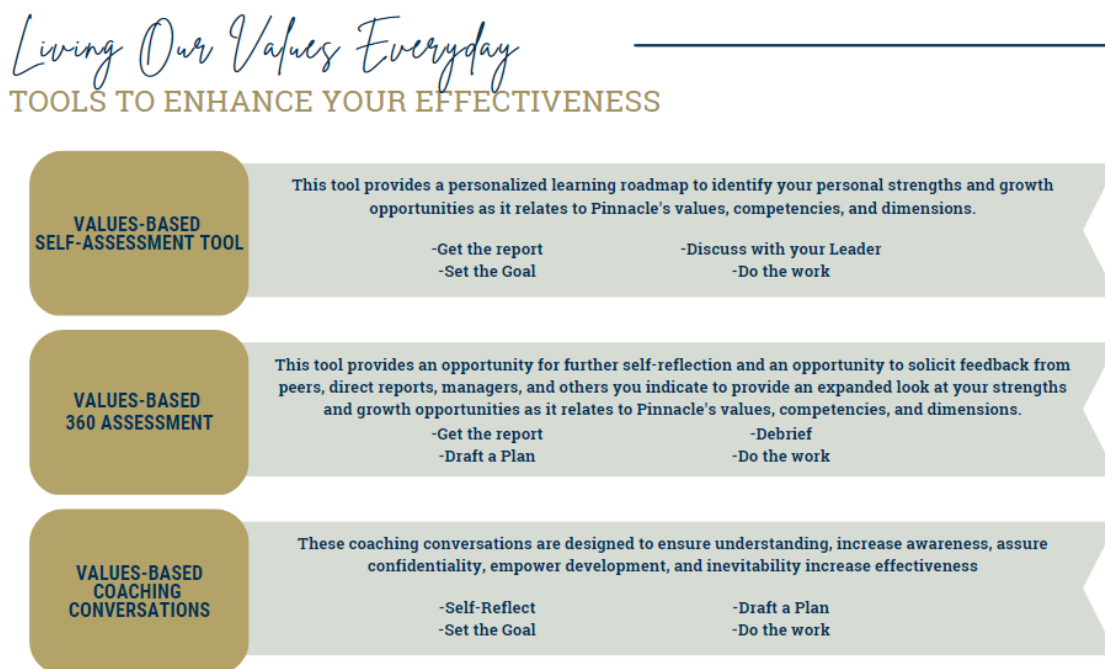


Figure 3.14. *Cycle 3 Interventions.*

The VBSA was used as prework for the workshops. In each workshop, we asked, by a show of hands, whether people agreed with their reported areas of opportunity. In each workshop, approximately half of the participants did not agree with their reported areas of

opportunity. However, by the end of each workshop, we obtained unanimous agreement from participants that, after gaining a fuller understanding and engaging in moments of critical self-reflection, there were places where there could be further alignment between their words and actions. The key here was the nonjudgmental, personal look that the self-assessment afforded. Tools like the VBSA can help when psychological safety has not been fully established and team members are less comfortable calling out incongruent behaviors. Without such self-assessment, these areas might remain blind spots for the individual. For example, during an interview, we asked one participant, “*We Act Ethically is one of our organizational values. Do you believe you exhibit this value in your day-to-day activities?*” The participant responded, “*Definitely.*” However, in this participant’s answers to VBSA questions, *We Act Ethically* was listed in the bottom three. This result does not mean that the participant is totally unethical. Instead, it indicates that, based on the behaviors identified for this particular value, there are some areas where they could shore up a bit. The VBSA helps participants make these self-discoveries.

While we cannot draw a specific and direct correlation between the learning roadmap and the increase in the use of learning resources indicated by learning management system usage reports, we are encouraged by the uptick in workshop attendance and the use of other related resources referenced in the roadmaps. We were very thoughtful in this design in attending to the various ways people learn. The goal was to help community members continue learning.

Values-Based 360 Assessment

Through the actions outlined above, we had ensured that PU community members had been fully informed of the organization’s values, definitions, and associated behaviors. We were equipped with a self-assessment tool, the VBSA, to help community members identify personal blind spots and take the time to grow their skills in their areas of opportunity. We were now

ready to get feedback from others. After 6 months, we launched the values-based 360 assessment.

To date, 37 people have participated in the 360 assessment and coaching activities. We found some disparity in the results between how people rate themselves and how others see them. We closely examined the value for which the respondents scored highest overall, *Nurturing the Well-Being of our Community*, and the strongest area of opportunity, *Safeguard Freedom of Inquiry and Expression*. There was alignment between how respondents saw themselves and how others saw them in the results for the *Nurturing the Well-Being of our Community* value. A slight disconnect, however, was observed between how the respondents saw themselves and how others saw them demonstrating the value *Safeguard Freedom of Inquiry and Expression*. Notably, others perceived respondents as demonstrating the value of *Safeguard Freedom of Inquiry and Expression* better than the respondents did themselves. It is interesting to compare this finding with the scores we observed on the DLOQ for the *dialogue and inquiry* (DI) dimension—perhaps the dip in scores for that dimension was indicating this gap in how people see themselves.

After reviewing all the data collected, I triangulated multiple data sets, uncovered themes, and determined the study findings and conclusions, all of which are discussed in detail in Chapter Four. Key activities in the study included the following:

- (a) A 360 assessment that helped PUPE community members self-reflect on places individually where their actions were congruent with demonstrating organizational values and opportunities where their actions were incongruent with said values. They also received a learning resource roadmap personalized to help them grow and develop.

- (b) Learning sessions in which PUPE community members participated in exploring the meaning of psychological safety and operationalizing tactics at the individual and organizational levels to increase psychological safety.

As a result of these activities, PUPE leaders increased their understanding of the needs of their groups to feel supported in sharing their views, asking questions, and taking risks. As stated by AR team member 3 (TM3),

This process has given me a new direction and vision that being good at your job includes making sure there is safety in your job. Which is why again, all of my new hires need to have an upfront understanding of the psychological safety we intend to foster.

This perception was also supported by AR TM1, who stated:

I have seen an increase in knowledge about both these topics. If there is a problem with value congruence, and community members don't feel safe to point that out absolutely no learning can be gained! All of these concepts are interrelated in my observation. I am so encouraged when I see PUPE leaders putting this stuff into action.

While cycle three was the last cycle for this AR project, this work continues. Building culture is not a one-and-done activity. These interventions have been designed to become a mainstay in offerings as we seek to build a culture that Pinnacle University community members can be proud of. The VBSA and learning roadmap have been accessed 278 times, with 125 people completing the full report.

While not directly connected to the study by way of a planned intervention, but rather because of the work of the AR team and one team member's connection to the PU Office of Human Resources, PUPE community members will now be required to set annual values-based goals and be evaluated on them yearly. This is an unintended but important outcome, as these

interventions and outcomes will continue to impact the PUPE culture for years to come positively. Cultural change takes time, and while the formal phases of this project have ended, the interventions will continue. There are workshops planned with registered participants through the end of the year. The assessments and coaching services are ready and available on the PUPE website for all to access. These are topics that are not one-and-done. We must visit and revisit them as we seek to align the madness behind the curtain with the magic that the audience experiences during the performance.

CHAPTER FOUR

INSIGHTS AND ACTIONABLE KNOWLEDGE

This chapter offers important insights and actionable knowledge about what was learned from this study. The answers to the research questions are provided and discussed, including the study's nine key findings and overall insights. The findings are the result of reviewing qualitative and quantitative data from this study, leveraging Amy Edmondson's (1999, 2018) psychological safety research, Chris Argyris's (1980) theories of action, and the Dimensions of the Learning Organization Questionnaire (DLOQ) constructed by Marsick and Watkins (1999) and refined by Yang et al. (2004) as a framework for learning organizations.

The purpose of this action research (AR) study was to explore what can be learned about value congruence and psychological safety and the effect of these concepts on an organizational learning culture. The AR team designed, implemented, and evaluated interventions that aided in identifying incongruence between our espoused values (what we say) and our theory-in-use (what we do) and enhanced psychological safety within an academic/business unit at a large public research university, pseudonymously referred to as Pinnacle University (PU). The project's goal was to improve the learning culture within the Pinnacle University Professional Education unit (PUPE) by achieving value congruence through increased psychological safety. The project focused on informing and educating the community about the behaviors necessary to demonstrate our values, determine what elements must be present to ensure congruence, measure how we are doing, and course-correct when necessary. The assumption was that if we could increase psychological safety, community members would feel free to engage in dialogue about

value incongruence that is actively found personally and within the organization. Empowered by powerful discussion tools, knowledge of places of incongruence, and the safety to address these gaps, the academic/business unit could further enhance our learning culture. This chapter draws on data collected throughout the study through the triangulation of multiple data collection methods, including AR team meetings, focus groups, interviews, survey data, observations, and document review, to answer the following research questions:

RQ1: What is learned at the individual, group, and system levels about value congruence and psychological safety, and how do they affect the learning culture within a business unit of a large research university?

RQ2: To what extent is the effect of value congruence and psychological safety linked to the learning culture?

Table 4.1 highlights the study's findings at each level of the system (individual, group, and system).

Table 4.1*Summary of Research Findings*

Research question	AR project findings
<p>RQ1: What is learned at the individual, group, and system levels about value congruence and psychological safety, and how do they affect the learning culture within a business unit of a large research university?</p>	<p>Individual</p> <ul style="list-style-type: none"> - Clear definitions of desired values, examples of behaviors to be exhibited, and relevant connections to day-to-day activities aid in creating the conditions for value congruence and psychological safety. - The degree of psychological safety was more greatly affected by parity and privilege than value congruence. - Individuals needed assistance in identifying areas where their actions did not align with the desired values. <p>Group</p> <ul style="list-style-type: none"> - Leadership played a critical role in achieving psychological safety and value congruence at the group level. <p>System</p> <ul style="list-style-type: none"> - Prioritization of these concepts at the system level is needed to sustain the focus on value congruence and psychological safety in an effort to sustain a learning culture. - Implementing accountability measures supported the achievement of value congruence and psychological safety within this community.
<p>RQ2: To what extent is the effect of value congruence and psychological safety linked to the learning culture?</p>	<ul style="list-style-type: none"> - Value congruence and psychological safety, demonstrated a highly significant and positive association with the learning culture.

Research Question 1

What Is Learned at the Individual, Group, and System Levels About Value Congruence and Psychological Safety, and How do They Affect the Learning Culture Within a Business Unit of a Large Research University?

Individual Level

Marsick and Watkins (1997) stated that learning is about how individuals make meaning; this emphasizes the subjective and personal nature of the learning process. Learning is not simply the acquisition of information but a process of constructing meaning and understanding based on an individual's unique experience and context. Early interventions in cycle 1 centered on learning workshops that provided an opportunity for dialogue, meaning-making, and idea-sharing around two concepts that turned out to be quite foreign to community members. We found a deficit in understanding key concepts central to the study: *psychological safety* and *value congruence*. These workshops created a safe space for first-person learning, and we found that they also inspired third-person learning. One workshop participant noted on their evaluation that

These workshops were excellent; I will be using these tools and hosting discussions about these concepts with my entire team. I want to be deliberate about creating a psychologically safe space for my team members.

As explained by Hays and Singh (2012), first-person inquiry provides an important basis for inquiring into one's own engagement. Second-person inquiry focuses on inquiry with others, while third-person inquiry looks to disseminate findings to a broader audience. Two other workshop participants reflected first-person learning in their end-of-workshop evaluation:

I never knew there was a term to describe my lack of comfort in sharing some of my off-the-wall ideas freely. This workshop helped me to understand that there have been times that I did not feel psychologically safe enough to do so.

The part where we discussed value congruence helped me to see the judgment that I pass on others I sometimes don't hold myself to those same hard standards of critique.

A summary of findings and themes for individual-level learning is provided in Table 4.2. These findings are then discussed individually in the following subsections.

Table 4.2*Findings and Themes of Individual Learning*

Research question	Findings
RQ1: What is learned at the individual, group, and system levels about value congruence and psychological safety, and how do they affect the learning culture within a business unit of a large research university?	<p data-bbox="695 407 1692 513">Clear definitions of desired values, examples of behaviors to be exhibited, and relevant connections to day-to-day activities aid in creating the conditions for value congruence and psychological safety.</p> <p data-bbox="695 553 1654 623">The degree of psychological safety was more greatly affected by parity and privilege than value congruence.</p> <p data-bbox="695 664 1675 732">Individuals needed assistance in identifying areas where their actions did not align with the desired values.</p>

Finding 1: Clear Definitions of Desired Values, Examples of Behaviors to Be Exhibited, and Relevant Connections to Day-to-Day Activities Aid in Creating the Conditions for Value Congruence and Psychological Safety

Many organizations publish and talk about their values, believing these values and their culture to be critical to their success. Importantly, Argyris (1985) has argued that values that are not openly articulated, or acknowledged, lead to “defensive routines” (p. 5) that inhibit learning and produce nonrational responses. We found in this project that simply emailing and displaying values on the PUPE website was insufficient. The PUPE values were finalized, posted on the organization’s website, emailed to community members, and the PU president spoke of them during his State of the University address in 2018. Moreover, the PUPE dean reshared information with the PUPE community specifically.

Even with this activity, many workshop participants showed up with little awareness of the values and expressed a lack of understanding of how the organization defined them and what behaviors were expected of them as individuals. Jonsen et al. (2015) asserted that these aspirational value statements do not add value in the now, only in the future, and only if the behaviors come into alignment. The workshops provided an opportunity for community members to align on the concepts of psychological safety and value congruence to ensure shared definitions and associated behaviors. We found that there were areas in which participants were already demonstrating some of the more common values and took advantage of the opportunity to illuminate practical ways that they could begin to do so in areas that were not as clear. One workshop participant stated,

This session cleared up many things for me, I wasn’t sure how I was supposed to operationalize some of these values in my day-to-day practices based on the work I do,

but this workshop helped me to clarify, and I have specific things I will now do. I would love for everyone to take this class so that we all have a shared understanding of what is expected.

In a study using longitudinal qualitative data from interviews with participants in alternative leadership preparation programs in New York City, Bulkley and McCotter (2018) illustrated the challenges of moving from espoused theories to theories-in-use and surmised that multiple exposures to data and structures coupled with the disposition to ask questions may be important in this forward movement. During the workshops, several insightful reflections were offered about this type of transition, as illustrated by one participant:

When I look at the value “students are our top priority,” I say of course they are. I don’t work with students every day, but I do know they are the primary reason we are here. This is higher education, after all. I now understand that in order to demonstrate that value, I need to consider how I am seeking student input and or positively contributing to the student experience, even though I don’t work directly with them every day. I did not know the institution at large finds value in my volunteering my time to serve student organizations as an advisor, or as a judge in their programs, or even just attending homecoming.

This study found many areas where PUPE community members espoused a value but were unaware of how to demonstrate it. For example, most initially felt that the value *We Are Responsible Stewards* largely concerned financial responsibility, yet while fiscal responsibility is part of this value, the definition speaks more broadly to being an example of sustainability, efficiency, respect, and responsibility. Throughout this study, we found that providing opportunities for PUPE community members to engage with the definitions and behaviors

expected and spend time thinking through practical ways that they could incorporate demonstrating values in their day-to-day activities increased the likelihood of value congruence. For example, AR team member 4 (TM4) explained that

Step one, we have to make sure that everyone knows the values and completely understands the behaviors associated with each value. You can't demonstrate or be congruent with things you don't know.

Without knowledge of how the organization defined the values and the expected behaviors, various assumptions were made about value congruence. Clearly articulating definitions helped PUPE community members make relevant personal connections, which has the capacity to increase value congruence. As one participant wrote on the workshop evaluation,

Now that I know our organization values leaders who initiate conversations about ethics with their teams and leads discussion about ways to put ethical considerations into practice, I am adding this to my meeting agenda quarterly to initiate an ethics-related topic discussion. When I take this assessment again, this will no longer be an area of growth for me, as now I know what to do.

Finding 2: The Degree of Psychological Safety Was More Greatly Affected by Parity and Privilege Than Value Congruence

Organizational behavioral scientist Amy Edmondson of Harvard University codified the concept of *psychological safety* as the belief that one will not be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes and that the team is safe to engage in interpersonal risk-taking (Edmondson, 1999, 2018). Her definition further suggested that a psychologically safe environment encourages, recognizes, and rewards individuals for their contributions and ideas by making them feel safe when taking interpersonal risks (Gartner, n.d.).

The quantitative data in this study indicated strong psychological safety ($M = 3.69$, $SD = .81$). However, when asked during interviews about how the organization encouraged, recognized, or rewarded team members for taking interpersonal risks, the interview participants came up empty. One member of the PUPE staff committee stated, “*Nobody uses it, but we can submit questions anonymously to be answered during the Q&A with the Dean.*”

When we attempted to validate the quantitative responses by asking in interviews what some events, processes, etc., were that might have led people to score psychological safety in PUPE as high, we heard the following from PUPE community member interview participant 1 (CMIP1):

I'm not sure why the data shows that we are safe psychologically. People don't ask questions or even really state their opinions openly. We have anonymous forums, and I guess that's good, but I also think that indicates an environment that is not safe for me to voice my opinions openly.

Social desirability bias suggests that people have a natural tendency to present themselves in a positive light to be viewed favorably by others, even if those presentations or responses do not reflect their genuine opinions and experiences (Fisher, 1993). Our guiding theory for this AR project, which suggests that individuals and organizations maintain theories of action that may not be compatible with their theories-in-use (Argyris & Schön, 1974), may also inform this type of duality in thinking. Such disconnects between theory and action may help explain the discrepancies between the quantitative and qualitative data in this study.

Although several studies have examined relationships between value congruence and outcomes, few have provided thorough explanations of why these relationships occur. Researchers have suggested various mechanisms that might account for the effects of value

congruence, but these remain largely speculative because they have not been tested as mediators of the relationships that link value congruence to outcomes (Edwards & Cable, 2009). Edwards and Cable (2009) pointed to trust as a key explanation of value congruence effects, followed by communication. Amos and Weathington (2008) suggested that employees' perceived congruence between employee and organizational values was positively associated with employee commitment to the organization.

Our own findings point to parity and privilege affecting psychological safety. Parity can be defined as the state of being equal, especially in relation to pay and position, and privilege speaks to a special right, advantage, or immunity granted or available only to a particular person or group (Oxford English Dictionary, n.d.). We found that participants felt more comfortable and psychologically safe in their smaller subteam environments in which they felt parity with their colleagues. During a community member interview, CMIP2 stated that

I feel like this [psychological safety] is a strength in my smaller team, but not PUPE-wide; maybe people were answering the question based on that. I never ask questions or share my opinions during the Dean's Q&A; I just hold them until our team meetings or ask my manager directly.

Privilege as a theme to be considered was discussed during critical incident (CI) interviews, as illustrated by CIIP1: “*Faculty and research, I am privileged; tenure means something; I now speak my mind more freely without fear – in a way I never would have ten years ago.*” Greater financial compensation was also mentioned by CIIP2 as a form of privilege that contributed to a greater sense of psychological safety:

Can you be safe – psychologically so – or otherwise in the workplace if you are not financially free? When you've organized your life so that you're not financially

constrained to a particular relationship, whether that's a relationship with a significant other or an employer, you move differently. Safety has been established. Nobody else has the quality of your existence in their hands. But when the reverse is true, there is an inherent fragility about safety.

Higgins et al. (2020) found that psychological safety on its own is not “helpful” regarding organizational performance. Perhaps contrary to expectations, they found that the best conditions for fostering organizational performance occurred when psychological safety was relatively low and felt accountability was relatively high. In this study, our survey results demonstrated higher levels of psychological safety, while qualitative data revealed lower perceptions of this area. PUPE has, however, established accountability measures built into performance management activities that require leaders to be measured on their ability to demonstrate inclusivity, of which psychological safety is a dimension. Psychological safety alone, however, is not the silver bullet for change in enhancing the learning culture.

Finding 3: Individuals Needed Assistance in Identifying Areas Where Their Actions Do not Align With the Desired Values

The AR team entered this study grounded in Argyris and Schön's (1974) theory of action. Based on this theory, which highlights personal difficulty in identifying potential incongruencies—which we also observed in our data—we launched a two-part intervention: (a) an education campaign aimed at familiarizing PUPE community members not only with the list of values but also detailed definitions and behaviors associated with demonstrating them; and (b) the Values-Based Self-Assessment (VBSA) tool. The VBSA was designed to go further in helping community members identify areas of strength and areas of growth related to connecting their actions to words. The self-assessment helped illuminate potential blind spots in PUPE team

behaviors. We used the definition of values and the associated behaviors to craft questions that we asked multiple times in different ways to measure how consistently the respondent answered the question. The assessment then generated a report snapshot that outlined areas of strength and areas of growth as well as a learning roadmap that provided suggested resources that could be used to help develop competency in areas of growth. One workshop participant stated,

I was resistant to the results as I would have never thought an area of growth for me would be We Act Ethically. However, in the section that details those who excel in this value exhibit these behaviors, I find I have some work to do. I'm thankful for the resources suggested to help me grow and develop in this area.

During AR team end-of-project (EOP) interviews, three of the five AR team members also described the VBSA as a powerful and useful resource that had been pivotal in their personal learning about their ability to achieve value congruence. As AR TM2 stated, *"I love the self-assessment you created as even though I thought I was congruent and likely am, this assessment showed me places I can enhance my alignment even further."* AR TM3 explained that

I've learned that anything I put my attention to, I can find areas of strength and areas of improvement. I decided to take the approach of looking at which values seemed most challenging, so I've been deliberately thinking about ways I can demonstrate that Students Are Our Top Priority even though I don't have direct contact with them based on my work.

The final team member to state explicit appreciation of the VBSA was AR TM4:

I know the theory you shared with us that it's often hard for us to see incongruence in ourselves, so after taking the self-assessment, I went to work. My lowest was We Are

Responsible Stewards. I had to really look at the behaviors because I would not have thought this would be lower.

As evidenced by these responses, our interventions helped participants, including members of the AR team, identify areas of strength and growth for value congruence and empowered them to feel capable of change.

Group Level

When people in power demonstrate through their behavior a willingness to entertain alternative points of view, employees feel emboldened to offer new ideas and options (Garvin, 2008). In discussing change at the group level, we scale back from PUPE as a whole to smaller subteams. Based on community member interview data, when asked questions about PUPE, most community members responded that they had answered the questions within the survey considering their subteams rather than the broader PUPE organization. This distinction perhaps speaks to cultural dynamics within the smaller teams and within the PUPE organization as a whole. PUPE staff committee member 4 (SCM4) explained these dynamics in an interview response:

My supervisor does her best to walk the talk; on our smaller team, she doesn't ask us to do things that she herself hasn't done or won't do. In that way, I find her behavior congruent with my understanding of our organizational values. I don't think, however, if she weren't that way, it would affect my behavior other than I'd probably be looking for a new job.

The findings and high-level themes for the group level are detailed in Table 4.3. These findings are then discussed in more detail in the following subsections.

Table 4.3*Findings and Themes of Group Learning*

Research question	Findings
RQ1: What is learned at the individual, group, and system levels about value congruence and psychological safety, and how do they affect the learning culture within a business unit of a large research university?	Leadership played a critical role in achieving psychological safety and value congruence at the group level.

Finding 4: Leadership Played a Critical Role in Achieving Psychological Safety and Value Congruence at the Group Level

During this study, members of intact teams with leaders who intentionally fostered an environment where community members felt safe by requesting feedback and cultivating one-on-one relationships reported enhanced feelings of psychological safety. As CMIP5 stated,

I have one-on-one meetings with my manager every other week, so even if I didn't feel safe providing my opinions in the larger group (which I don't have a problem with), we have built-in time for those types of discussions, and this makes a big difference, I appreciate her approach to this.

A workshop participant shared the following about their experience of psychological safety in a work environment:

An example of a time when I felt psychologically safe was when I was relatively new to the team, and I really didn't understand why the team was tracking data a certain way; I didn't understand the purpose and or the usefulness of the activity. I inquired about it and rather than make up some excuse, we interrogated the activity together and came to the

conclusion that the activity no longer made sense, and we discontinued it. This showed me early on that it was safe to question; even if we hadn't discontinued the activity, it would have made me feel good to know that we could examine my thoughts and that my contributions were valuable.

Further evidence of the importance of team leadership and engagement presented itself when we considered differences in the types and depth of discussion during open-enrollment workshop sessions versus intact-team workshop sessions. The discussions during the open-enrollment workshops were less transparent and included very little, if any, disconfirming information, even when the facilitator pressed the participants to dig deeper. The intact-team workshop participants engaged and even brought forward issues that could be considered negative, but these teams seemingly felt safe to do so. Table 4.4 illustrates this distinction by providing some representative responses from each group to the question “What makes you feel safe at work?”

Table 4.4

Illustrative Examples of Open-Enrollment vs. Intact-Team Workshop Responses

Prompt: “What makes you feel safe at work?”	
Open-enrollment workshop session	Intact team workshop session
<i>“An organization with a reputation for stability and no reduction in force”</i>	<i>“A leader who listens for understanding, not always trying to solve my problems”</i>
<i>“Team members that are trustworthy”</i>	<i>“Colleagues that I can trust”</i>
<i>“A healthy presence of law enforcement, we do work in the middle of [the city].”</i>	<i>“A work culture that encourages me to bring my whole self to work”</i>

One limitation of the meaning we can ascribe to this difference is that the leaders of the intact teams we worked with reached out to us requesting to participate and strongly encouraged their team members to do so as well. This proactive engagement was not necessarily present in some of the other teams whose leaders did not reach out to participate. Thus, while we have emphasized the engagement of smaller, intact teams, the formula for group engagement is an intact team plus an actively engaged leader who is encouraging discussions on these topics while actively seeking out opportunities to participate in cultivating a values-based campus culture. Perhaps intact teams with less than-engaged leaders would contradict this finding. As CMIP3 explained, community members may not feel safe participating in tough discussions without engaged leaders:

I've worked on three different teams within PUPE; trust me, all teams are not created equal. The last team I was on, I did not feel psychologically safe; I was always on edge. My current team, our team meetings, we all speak up, we encourage one another, and we push each other to be better.

Team engagement refers to more than simply willingness to gather in smaller groups; this study found that the most engaged teams also had the most engaged leaders. Behaviors reported by community members as correlating with engaged leaders included open and transparent communication, active inclusion, collaboration, trust of team members, and empowerment of them to make decisions. Figure 4.1 shows some responses defining engaged leaders generated by participants during an open enrollment workshop activity.

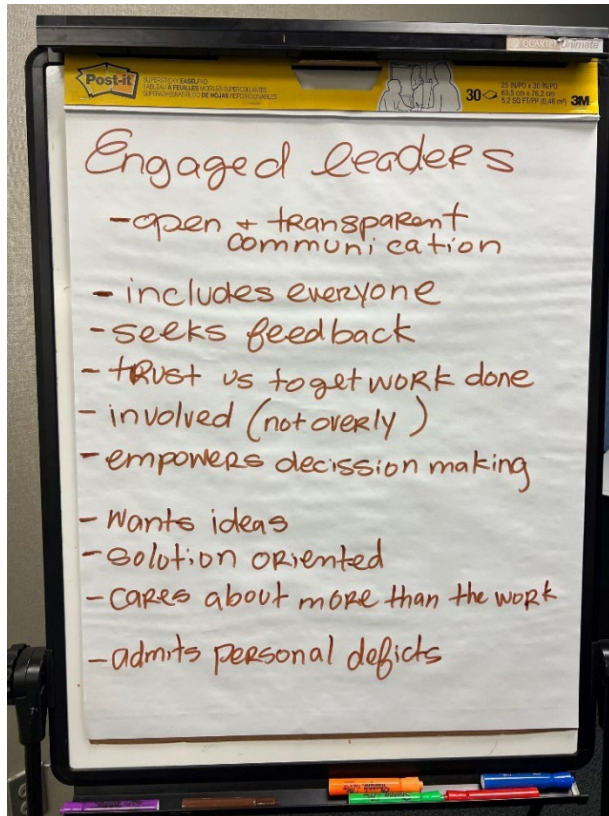


Figure 4.1. Workshop Participant-Generated Definitions of Engaged Leaders.

During the final exit focus group with the PUPE staff committee, participants shared several metaphors that further emphasized the importance of engaged leadership in cultivating a culture of trust and collaboration. One participant shared that *“A feedback-rich culture is like a life jacket that allows you to test the waters to see how safe it actually is to share.”* Another acknowledged, *“Talk to me nicely, and even if I do not like what you are saying, I will remain engaged.”* A third participant offered this perspective on leadership and engagement: *“Feedback is like an unexpected gift; sometimes you like the gift, other times you don’t, but either way, you still say thank you.”* And yet another participant offered: *“Value congruence is like a dance where there is synchronized movement between dancers, as one’s words are synchronized with actions.”*

Due to the high level of psychological safety in these intact teams, community members also reported feeling comfortable calling out value incongruence—the misalignment between words and actions—even though they did not reveal specific incidences where they had called out such incongruence. As CMIP4 stated, *“I feel very comfortable on my team; we definitely speak truth to power and each other, but I’ve never witnessed an incongruence that I felt the need to call out. We are a professional-acting bunch.”* We believe that community members are more likely to speak up and address value incongruence at the small group/intact team level because their team leaders are engaged and have established a level of safety that allows their team members to trust that their input will be respected and considered, even if their thoughts differ from the prevailing views. As CMIP6 stated,

Yes, there have been times in our PUPE All Team meeting where I’ve thought to myself that doesn’t sound right, or – that is different from my experience. However, the venue doesn’t seem appropriate or conducive to raising concerns. If it’s a big deal to me, I talk to my supervisor about it in our one-on-one meetings.

The EOP interviews with the AR team produced several insights that we believe are critical to the research study. For example, AR TM1 stated that *“We were quickly able to establish psychological safety.”* She attributed this to the fact that the team *“co-created our agreements early in the process, and all agreed to provide feedback early and often.”* She continued, highlighting the importance of engaged leadership for psychological safety: *“Your ability as the convener to model constructively delivering feedback focused on specific behaviors and or actions set the stage; many cycles of feedback became the norm during our meetings.”* This team member further reflected on what appeared to be the innate ability for psychological safety to be achieved in smaller groups and connected that to richer feedback discussions: *“I’ve*

learned leaders should leverage the synergies found in their smaller groups and make deliberate efforts to model and encourage open dialogue.”

System Level

Learning at the system level speaks to acquiring knowledge, adapting behaviors, and improving performance within a complex system. It often requires involvement at the group and individual levels. At the system level, the DLOQ by Marsick and Watkins (1999) includes the dimension of *creating systems to capture and share learning*, which was also an area of opportunity indicated by the PUPE quantitative survey results. Our findings at the system level reiterated the need for continuous learning and development, specifically in the topic areas of psychological safety and value congruence. For example, an area of strategic leverage was in the measurement of the results of time and resources spent on training ($M = 3.19$), while an area of strategic advantage was the creation of systems to measure gaps between current and expected performance ($M = 3.51$). These and other results highlight the necessity of linking learning and development activities to close performance gaps. Table 4.5 outlines the findings at the system level, which are then discussed in greater detail in the subsequent subsections.

Table 4.5

Findings and Themes of System Learning

Research question	Findings
RQ1: What is learned at the individual, group, and system levels about value congruence and psychological safety, and how do they affect the learning culture within a business unit of a large research university?	<p>Prioritization of these concepts at the system level is needed to sustain the focus on value congruence and psychological safety in an effort to sustain a learning culture.</p> <p>Implementing accountability measures supported the achievement of value congruence and psychological safety within this community.</p>

Finding 5: Prioritization of These Concepts at the System Level Is Needed to Sustain the Focus on Value Congruence and Psychological Safety in an Effort to Sustain a Learning Culture

In the 1880s, German psychologist Hermann Ebbinghaus first proposed what he termed the “forgetting curve.” Modern research on the forgetting curve has shown varying forms of this curve, but in general, “large learning gains” are made early in the learning process but are followed by “a massive early decline in performance” that is “followed by slower decline” (Blech & Gaschler, 2018, p. 309). Frequent self-review, practice, and learning that is distributed over multiple sessions are important for “cognitive fluency” in a concept, whereas attempting to “cram” knowledge will generally fail in the long run (Blech & Gaschler, 2018, p. 317).

The importance of continuous practice in internalizing knowledge, rather than expecting a single session to produce lasting results, was emphasized by AR TM1:

How do we ensure that PUPE doesn't pass this work off as the work of the learning team? This is work that we all must collectively engage in together. Please don't send your problem children to training and think that will fix all your problems. We must engage together, each of us taking ownership in our part in shifting our culture, and requiring training ain't it.

The PUPE staff committee agreed, with SCM2 stating:

Keeping this discussion (about psychological safety) going will be important for me and my team. As compared with other teams on our campus, we have a lot of turnover. This requires me, as the leader, to consistently reinforce the message and check in with my team. In my role on the staff council, the same is true we are always encouraging the

dean to be more transparent, and share more information. That is the biggest piece of feedback we get.

Finding 6: Implementing Accountability Measures Supported the Achievement of Value Congruence and Psychological Safety Within This Community

During this research study, PUPE began to tie goal setting and other performance management activities to organizational values. For the first time, community members had to set goals aligned with the organization's values and draw a one-to-one correlation between performance goals and a particular value. During this goal-setting time, we saw a 42% increase in the use of our VBSA. Before this requirement, 52 of the 132 faculty and staff members in PUPE had completed the VBSA (27%). After this requirement was instituted, a total of 128 (96%) people leveraged this tool.

Collectively, the PUPE community scored the highest in the value *We Nurture the Well-Being of Our Community* (83.01/100). The bottom three values for PUPE collectively, representing the strongest areas for growth, were *Students Are Our Top Priority* (56.84/100), *We Safeguard Freedom of Inquiry and Expression* (57.19/100), and *We Act Ethically* (64.1/100). A snapshot of these results is shown in Figure 4.2.

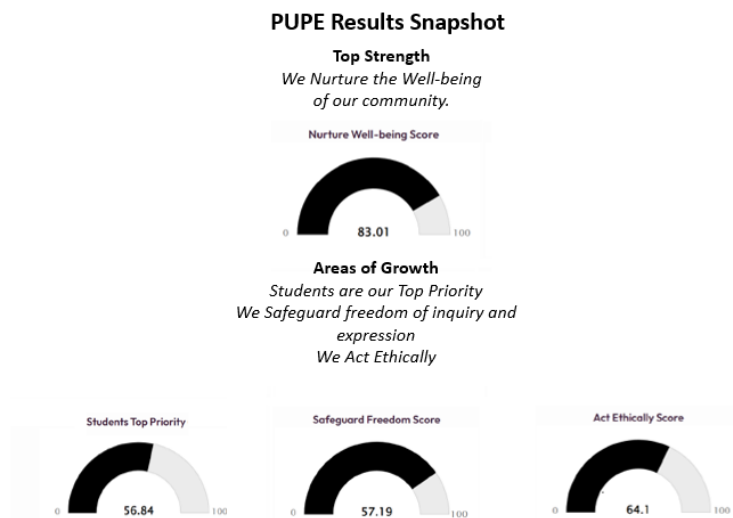


Figure 4.2. *PUPE Values-Based Self-Assessment Scores*

We attribute the spike in the use of this tool to community members seeing the usefulness of the tool in helping them to identify performance goals that satisfied a requirement that was monitored at the organizational level. When specific measures are put in place to track and evaluate adherence to a policy or procedure, it directs attention to the area that is being measured. This focus on accountability creates a sense of responsibility and directs focus toward not just what is expected but what is tangibly measured and assessed. As illustrated in Figure 4.3, 83% of PUPE community members submitted and had their values-based goals approved by the deadline, while just 9% left their goals in draft status, and 8% had submitted goals but not yet received manager approval.

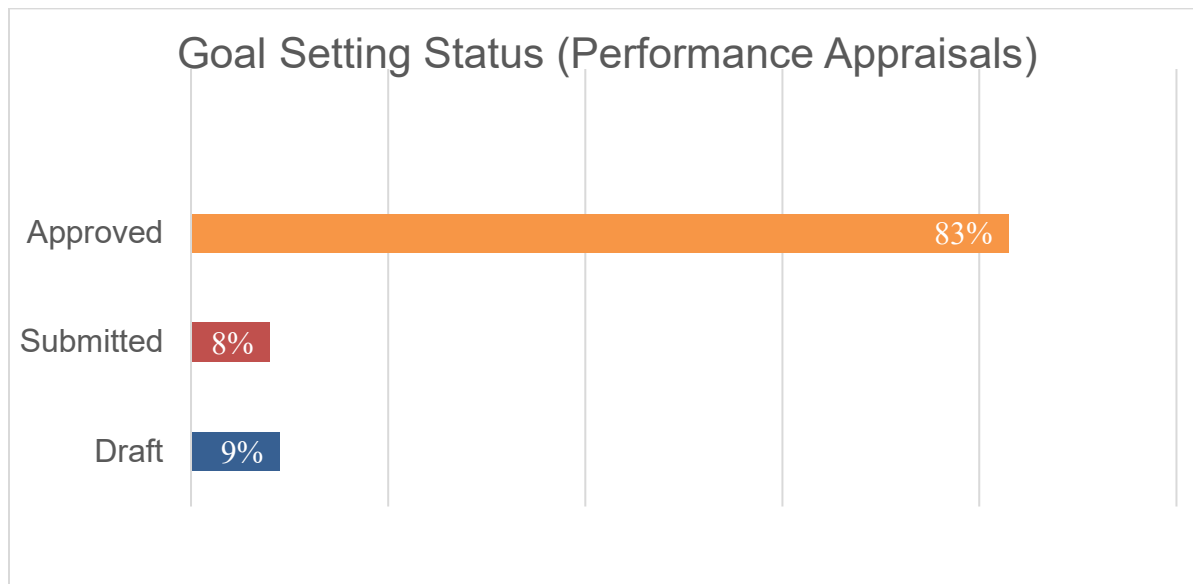


Figure 4.3. *Status of Values-Based Goals Submissions.*

Research Question 2:

To What Extent Is the Effect of Value Congruence and Psychological Safety linked to the Learning Culture?

The quantitative results in this study describe an organization with above-average value congruence, strong psychological safety, and high marks in almost all dimensions of the learning organization. In this study, two instruments were combined for our quantitative survey assessment. The first was the abbreviated 21-item form of the Dimensions of Learning Organization Questionnaire (DLOQ) by Marsick and Watkins (1999) and refined by Yang et al. (2004), which maintained similar construct validity and reliability. The DLOQ was designed to measure learning culture in organizations and intends to capture the employee's perception regarding the seven dimensions examined to help the organization get a clearer picture of where they are versus where they need to be (Marsick & Watkins, 2003). In addition, we used one item from the DLOQ's *strategic leadership for learning* dimension to measure value congruence. The

second instrument comprised seven items from the Psychological Safety survey (Edmondson, 1999, 2018). Amy Edmondson’s research focuses on the impact of psychological safety (or the lack of it) on team and organizational performance. We used these items to measure the level of psychological safety within PUPE.

The survey was administered through Qualtrics and sent to participants via email. A total of 77 participants were included in the study; their demographic information is provided in Table 4.6. More than half of participants identified as woman ($n = 45$, 58.4%), 22 (28.6%) as Man, seven (9.1%) preferred not to answer, and two (2.6%) participants indicated that they were either gender variant/nonconforming or not listed (one response each). Thirty (39%) had been members of the PUPE community for between 1–5 years, 18 (23.4%) for between 5–10 years, 13 (16.9%) for less than 1 year, and 12 (15.6%) had been community members for 10+ years.

Table 4.6

Study Demographics

	Frequency	Percentage
How long have you been a member of the Pinnacle University Professional Education unit (PUPE) community?		
Less than 1 year	13	16.9
1–5 years	30	39.0
5–10 years	18	23.4
10+ years	12	15.6
With which gender identity do you most identify?		
Man	22	28.6
Woman	45	58.4
Gender variant/ nonconforming	1	1.3
Not listed	1	1.3
Prefer not to answer	7	9.1

Marsick and Watkins (1999) identified key practices, or dimensions, for learning organizations at the individual, group, and organizational levels. These practices, illustrated in Figure 4.4, are: (1) creating continuous learning opportunities; (2) promoting inquiry and dialogue; (3) encouraging collaboration and team learning; (4) creating systems to capture and share learning; (5) empowering people toward a collective vision; (6) connecting the organization to its environment; and (7) providing strategic leadership for learning (Marsick & Watkins, 1999, p. 11).

Quantitative Results for DLOQ Measurement of PUPE's Learning Organization Culture

The DLOQ (Marsick & Watkins, 1999; Yang et al., 2004) was used to measure the learning organization culture with PUPE, capturing community members' perceptions regarding the seven dimensions included in the scale. The means (M) and standard deviation (SD) values for the 21-item version of the DLOQ (Yang et al. 2004) are presented by item and grouped by dimension in Table 4.7.

Table 4.7

Means and Standard Deviations for DLOQ Items by Dimension

<i>DLOQ dimension and level (in parentheses)</i>	<i>Item</i>	<i>M</i>	<i>SD</i>
Continuous learning opportunities (individual)	In PUPE, people help each other learn.	3.87	1.08
	In PUPE, people are given time to support learning.	3.64	1.13
	In PUPE, people are rewarded for learning	3.79	1.00
	Mean by dimension	3.76	1.07
<i>Dialogue and inquiry (individual)</i>	In PUPE, people give open and honest	3.62	1.01

<i>DLOQ dimension and level (in parentheses)</i>	<i>Item</i>	<i>M</i>	<i>SD</i>
	feedback to each other.		
	In PUPE, whenever people state their view, they also ask what others think,	3.59	1.02
	In PUPE, people spend time building trust with each other.	3.46	1.08
	Mean by dimension	3.55	1.03
<i>Collaboration and team learning (team)</i>	In PUPE, teams/groups have the freedom to adapt their goals as needed	4.16	1.01
	In PUPE, teams/groups revise their thinking as a result of group discussions or information collected	3.77	0.97
	In PUPE, teams/groups are confident that the organization will act on their recommendations	3.31	1.15
	Mean by dimension	3.74	1.04
<i>Creating systems to capture and share knowledge (organization)</i>	PUPE creates systems to measure gaps between current and expected performance.	3.51	0.99
	PUPE makes its lessons learned available to all employees.	3.35	1.03
	PUPE measures the results of the time and resources spent on training.	3.19	0.98

<i>DLOQ dimension and level (in parentheses)</i>	<i>Item</i>	<i>M</i>	<i>SD</i>
<i>Shared values and collective vision (organization)</i>	PUPE recognizes people for taking initiative.	3.80	1.04
	PUPE gives people control over the resources they need to accomplish their work.	3.70	0.98
	Mean by dimension	3.51	1.00
	PUPE supports employees who take calculated risks.	3.56	0.95
	PUPE encourages people to think from a global perspective.	3.86	1.06
	Mean by dimension	3.71	1.00
<i>Connecting the organization to its environment (external)</i>	PUPE works together with the outside community to meet mutual needs.	3.84	0.96
	PUPE encourages people to get answers from across the organization when solving problems.	3.81	1.12
	Mean by dimension	3.82	1.04
	<i>Strategic leadership for learning (external)</i>	PUPE leaders mentor and coach those they lead.	3.64
	PUPE leaders continually look for opportunities to learn.	3.66	1.08
	Mean by dimension	3.65	1.05

The two largest areas of opportunity based on the data reported were *promoting dialogue and inquiry* (individual level) ($M = 3.55$; $SD = 1.03$) and *creating systems to capture and share learning* (organizational level) ($M = 3.51$; $SD = 1.00$).

The *dialogue and inquiry* (DI) dimension speaks to the individual's productive reasoning skills to express views, the capacity to listen and inquire into the views of others, and a culture that supports questioning, feedback, and experimentation (Marsick & Watkins, 1999). At PUPE, the mean score of the DI dimension was 3.55 on a 6-point scale, which is slightly above the midpoint. The area of strategic advantage within DI was that people gave open and honest feedback to one another ($M = 3.62$). The area of strategic leverage was that people spend time building trust with each other ($M = 3.46$). While these scores place the PUPE team within the middle range, these dimensions were also the lowest-scored overall, which gave us clues into areas for intervention.

The second area of opportunity was *creating systems to capture and share learning*. According to Watkins, organizations tend to have difficulty in creating ways to capture the wisdom of their members, and it is not uncommon for embedded systems to capture and share knowledge to receive low ratings. As indicated in Table 4.7, embedded systems at PUPE were scored slightly above the midpoint of the range ($M = 3.51$). The area of strategic advantage was the creation of systems to measure gaps between current and expected performance ($M = 3.50$). The area of strategic leverage was the measurement of the results of time and resources spent on training ($M = 3.19$).

Quantitative Results for Value Congruence

Value congruence was measured quantitatively through the following item, adapted from item 21 on the DLOQ (Marsick & Watkins, 1999): "PUPE leaders ensure that the organization's

actions are consistent with its values.” The PUPE team members performed above average on this item ($M = 3.74$). The data further revealed that those PUPE team members with tenure of 10+ years in their position had higher confidence in their leaders’ ability to ensure that the organization’s actions were consistent with its values ($M = 3.86$). Those with less than 1 year with the organization had the least confidence in their leaders’ ability in this area ($M = 3.51$).

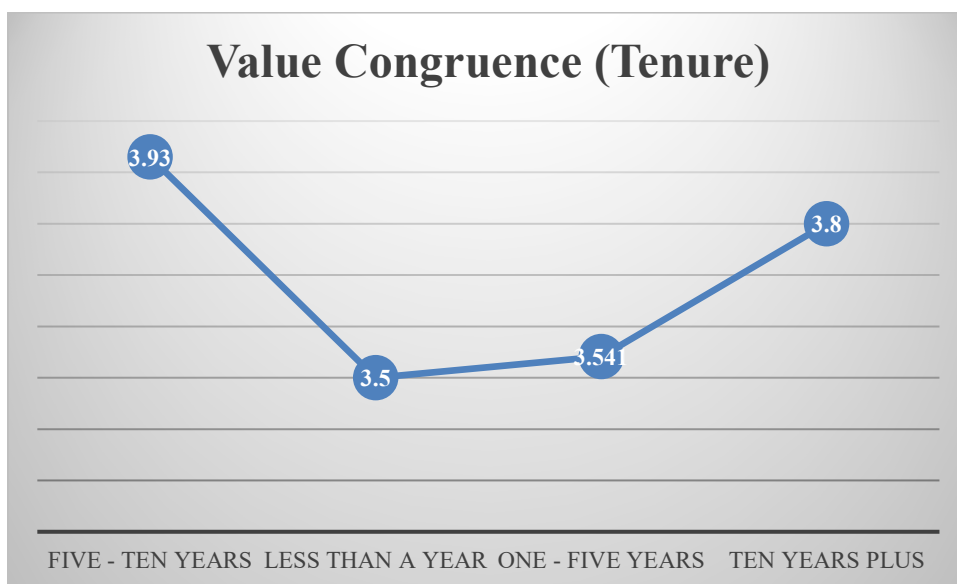


Figure 4.4. *Relationship Between Value Congruence and Organization Tenure.*

Quantitative Results for Psychological Safety

Psychological safety was measured with seven survey statements we adapted from Edmondson (2018, p. 20) scored on a 1–5 scale (1 = *strongly disagree* to 5 = *strongly agree*). The means and standard deviations are provided for each item in Table 4.8. The general positive response to the first five statements and a negative response to the final two statements indicated strong psychological safety.

Table 4.8

Means and Standard Deviations for Psychological Safety Questions

Question	Item	<i>M</i>	<i>SD</i>
Q-1	People in PUPE are able to bring up problems and tough issues.	3.49	1.19
Q-2	I feel safe to take a risk in PUPE.	3.47	1.22
Q-3	It is difficult to ask other members of PUPE for help.	2.54	1.34
Q-4	No one in PUPE would deliberately act in a way that undermines my efforts.	3.47	1.29
Q-5	Working with members of PUPE, my unique skills and talents are valued and utilized.	3.9	1.05
Q-6	If I make a mistake in PUPE, it is often held against me.	2.3	1.15
Q-7	People in PUPE sometimes reject others for being different.	2.0	1.10

Note: Q3, Q6 and Q7 have been reverse scored (Edmondson, 2018, p. 20).

Cross-Industry Comparison of DLOQ Results

To understand how PUPE data compares to other industries, I examined several other studies that implemented the DLOQ (Leufvén et al., 2015; Song et al., 2009; Voolaid & Ehrlich, 2017). In the three studies I looked at, scores ranged between 3.00–4.00 on a 6-point scale. In a low-resource healthcare setting in Nepal (Leufvén et al., 2015), scores were in the lower 3.0 range. In higher education institutions in Estonia (Voolaid & Ehrlich, 2017), the dimension of *embedded systems to capture and share knowledge* was an area of opportunity, which was the same for the PUPE community. As another data point, I included data from two major Korean conglomerates (Song et al., 2009), both of which had areas of opportunity on the dimensions of *dialogue and inquiry* (which matched the results for PUPE) and *empowerment towards shared vision and values*. Overall, most organizations' scores by dimension range between 3–4, i.e., the midrange of a 6-point scale.

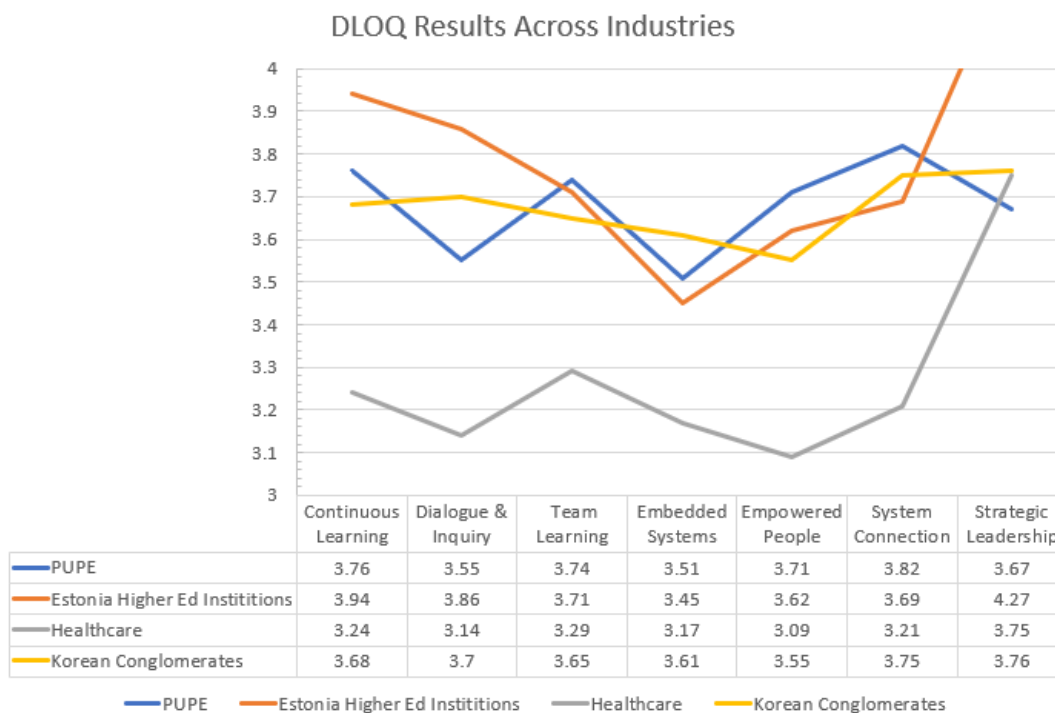


Figure 4.5. *DLOQ Results Across Industries.*

Relationship measurement is one of the most important statistical tools being used in the field of data analysis and research (Grange et al., 2016). Multiple regression is a form of relationship measurement, in that the term “relationship” refers to the association or connection between variables. Multiple regression analysis stands as a pivotal statistical tool in the realm of data analysis and research (Smith et al., 2018). This allows for a comprehensive examination of relationships among multiple variables. In this study multiple regression analysis allowed us to see the strength and direction of value congruence, psychological safety, and learning organization. Table 4.9 summarizes the findings answering research question 2 (RQ2): To what extent is the effect of value congruence and psychological safety linked to the learning culture?

Table 4.9*Summary of Results*

Research question	Hypothesis	Results
RQ1: To what extent is the effect of value congruence and psychological safety linked to the learning culture?	Value congruence and psychological safety have the capacity to positively affect the learning culture.	- Value congruence and psychological safety demonstrated a highly significant and positive association with the learning culture.

In the first model (see Table 4.10), where we used sex and years of work as predictors, the ability of the model to explain learning organization culture was quite limited. Only 5.3% of the variability in learning culture could be accounted for by these two factors. In the second model, where the predictors were sex, years of work, values congruence, and psychological safety, the model's explanatory power significantly increased to 57%. This means that these four variables together explain 57% of the variation in learning organization culture. Both value congruence and psychological safety have a meaningful and positively influencing role in shaping learning organization culture, and these relationships are statically significant (beta + .671 and .209, respectively).

Table 4.10*Regression Model with Demographic Data*

Model Summary				
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.231 ^a	.053	.018	.82371
2	.755 ^b	.570	.537	.56593

a. Predictors: (Constant), Sex, Years

b. Predictors: (Constant), Sex, Years, PsySafe, VC

Table 4.11 shows that while there is something to be learned by including the demographic data, the iterative process of constructing this regression model revealed that more than half of the variance in the learning culture can be attributed to the variables value congruence and psychological safety rather than the demographic variables.

Table 4.11*Regression Model without Demographic Data*

Model Summary				
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.820 ^a	.673	.663	.56355

a. Predictors: (Constant), PsySafe, VC

Several key findings related to factors influencing learning organization culture are illustrated in

Table 4.12.

- Years of Work: As years of work increased, there was a tendency for a more positive learning culture within the organization.
- Value Congruence: Value congruence had an even more powerful effect on learning organizational culture. This means that when leaders ensure that the organization's actions are consistent with its values, it strongly contributes to fostering a positive learning culture.
- Psychological Safety: Psychological safety is crucial to organizations who desire to cultivate a strong learning culture.

Table 4.12

Years of Work, Value Congruence, Psychological Safety, and the Learning Culture

		Coefficients^a				
Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	3.912	.356		10.993	.000
	Years	-.035	.118	-.040	-.299	.766
	Sex	-.307	.176	-.234	-1.747	.086
2	(Constant)	.692	.662		1.046	.301
	Years	-.097	.082	-.110	-1.187	.241
	Sex	-.108	.124	-.082	-.869	.389
	VC	.522	.074	.671	7.096	.000
	PsySafe	.422	.189	.209	2.229	.030

a. Dependent Variable: DLOQ

Going into this project, my assumption was that if psychological safety was present, then community members would feel free to actively engage in dialogue about value incongruence. A community culture with value congruence and high psychological safety would create a positive

learning culture. The statistical data findings align with my experiences as a practitioner. Value congruence and psychological safety strongly influence learning organizational culture. Learning and development professionals are encouraged to go beyond the traditional idea of ideal value congruence, and actively cultivate a positive learning culture. Leaders who value dialogue and inquiry, question existing practices, and encourage the sharing of new ideas contribute significantly to improving learning opportunities within an organization. These leadership practices are interconnected with both value congruence and psychological safety. These findings emphasize the importance of value congruence and psychological safety in shaping a positive learning organizational culture. The practical recommendations highlight the role of learning professionals combined with leadership practices in fostering an environment that supports continuous learning and improvement.

Insights

The divergence between the quantitative and qualitative data in this study highlights the importance of triangulation. I aimed to dig into these differences and gain insights into the varying perspectives and experiences explored in this research project. The nine findings in this study generated the following insights.

There Is Value in Leveraging Community Members as Partners to Initiate Culture Change

Engaging community members as partners increased the likelihood of them taking ownership of the change process. Leveraging community members in this work was valuable. We have to be intentional so that communities are not left feeling acted-upon and instead feel empowered through engaged, collaborative leadership. The invaluable knowledge, lived experiences, and deep understanding of the context of the AR team and the PUPE staff committee helped create this collaborative environment. Having the AR team and the PUPE

team test our interventions first and act as champions lead to greater buy-in by the PUPE community. Shifting the focus from the change itself to involving the people facing the change has the most powerful and profound impact (Moran et al., 2000). Change driven by the community members also tended to be more sustainable, as evidenced in many postintervention exit surveys. For example, 72% of respondents to the level-1 surveys administered at the end of learning-related interventions indicated that they would share the knowledge they had gained with their teams and implement the concepts discussed. Although the response rate was lower to the level-2 surveys, administered 30 days postintervention, 92% of those who responded indicated that they had used the concepts discussed. Finally, the net promoter score around recommending learning-related interventions to others was 87%.

Organizations That Value a Learning Culture Clearly Articulate Values and Cultivate a Culture of Safety so That Deficiencies Can Be Pointed Out and Addressed

PUPE has begun to see the value of encouraging team members to learn, grow, and continue to develop their knowledge, skills, and abilities in this space. The AR team noticed a renewed focus by the PUPE dean on encouraging people-leaders—within PUPE, those who have direct-report employees—to participate in self-reflection about their own engagement and how they are engaging with their teams. After I debriefed the dean on the findings from this study, during the last people-leaders meeting, he asked the group, “What engages you at work?” His discussion with this group of leaders included an explicit focus on fostering psychological safety by showing vulnerability, being proactive, and offering space for team members to “try new things” and share both successes and failures. It was encouraging to hear the dean use the shared language provided by the AR team as he articulated his desire for PUPE to exhibit the characteristics of a learning organization and recognized that it would take all of us to get there.

Leadership plays a crucial role in this work; soliciting feedback, staying open to feedback, and acting on feedback when appropriate all increase the chance of walking in congruence with what is espoused by our organization. If we cannot see value congruence in ourselves, we can rest in the comfort of knowing that we work within a culture that is supportive of engaging in dialogue about it. Being able to communicate with others in organizations is an important predictor of job satisfaction because open communication provides information that helps employees focus their behavior in ways that achieve personal and organizational goals (Goldhaber et al., 1978; Locke, 1976; Schuler, 1979). As discussed in this dissertation, Argyris and Schön (1974) distinguished between two types of theories: theories of action and theories in use. The lack of consistency between these theories that is often present in organizations necessitates that leaders create a feedback-rich environment to help team members work toward stronger communication, value congruence, and psychological safety.

Frier teaches us a valuable lesson through his work. “Let conscientização be our guiding light, inspiring us to question, learn, and act for the betterment of ourselves and our society. Together, we can strive for a more equitable and compassionate future, where conscientização remains our steadfast ally on the path to positive change (*History of Social Work, details*. (n.d).” Organizations that value a learning culture clearly articulate values and cultivate a culture of safety so that deficiencies can be pointed out and addressed. Values must be more than just a post on a website or an email announcement. A feedback-rich culture must be cultivated so that disconfirming opinions can be excavated - deficiencies can be recognized and pointed out without fear so that they can be addressed, and organizations can have the learning culture that we aspire to have. This must happen community-wide at all levels,

Implications for Future Research

Numerous studies have considered psychological safety, value congruence, and the learning organization as individual constructs. Although the results of the quantitative and qualitative data analysis in this AR project suggested mixed results, additional research is needed before we entirely discount the idea of connections among these three constructs. For example, the concepts of parity and privilege emerged as important in our investigation of psychological safety and its relationship to value congruence. Emerson and Murphy (2014) suggested that situational cues like microaggressions and overt prejudice contribute to disparate psychological experiences for racial and ethnic minorities at work and note that by acknowledging and altering threatening cues, organizations may create more equitable, respectful, and inclusive environments where all people may thrive and achieve *identity safety* (p. 509), which is a very similar concept to that of psychological safety employed in this study. Do such situational cues indicate levels of parity and privilege that we can manipulate to increase psychological safety? Based on questions from this research project, the answer seems to be in the affirmative; however, more research on parity and privilege as it relates to psychological safety is needed to answer this question.

It is important to note that one question from the DLOQ was used to measure value congruence after an unproductive search for other validated instruments. Further investigation into ways to measure value congruence in organizations may be a path for greater pursuit. Similar to other AR studies, another limitation was that it was conducted in a single business unit within an academic setting; more research in a broader scope in varying industries is needed.

Final Reflection

I have the privilege of working to help solve complex and often ambiguous people-related challenges that most usually deal with uncertainty, multiple perspectives, and changing circumstances. Doing this work at a large research institution of higher learning with people who are accustomed to solving well-defined problems that have clear cause-and-effect relationships can be challenging, to say the least. Leading this AR project has stretched and strengthened my confidence and ability to successfully lead change in this complex environment in many deeply impactful ways. My appreciation for the impacts of psychological safety and value congruence has grown as I have witnessed how both psychological safety and value congruence can be instrumental in fostering an environment of trust, collaboration, and growth. In this final reflection, I have detailed a few things I will keep sacred as gems collected through this process.

I believe psychological safety to be a key ingredient in high-performing teams that exhibit the dimensions of a learning organization. I have learned the art of active listening with genuine interest and empathy. I have learned the necessity of diverse perspectives to bring forth fresh ideas, as well as the necessity of cultivating an environment in which we can all learn from our mistakes, reframing them as opportunities to learn and grow so that we all feel safe to take risks and innovate.

For example, during a large change initiative that happened to converge at the same time as this AR project, I found myself actively engaging in unfamiliar territory with unfamiliar colleagues with whom I had not yet established relationships, nor had we had prior opportunities to work or collaborate together. I found myself calling upon the same skills leveraged during the AR project to navigate implementing this change as an active participant. I did not feel safe to express dissenting views in this process. I noticed misalignment between what was said and the

actions taken. I thought, *Here I am, guiding others while navigating these waters myself*. I took this experience as further evidence that psychological safety is not a destination that you can arrive at by entering an address into a GPS and driving in a straight line. Work is so fluid, with new and changing dynamics, and the skills gathered along each journey serve as powerful tools that we will keep adding to our toolbox.

Value congruence requires a high level of personal reflection, which at the onset of this project was not a consistent and active part of my leadership practices. I have learned to invest time in clearly articulating values that ground and guide my work. I have learned that I must show the way and inspire my team to uphold these values by consistently demonstrating them myself. What I utter with my mouth, my actions must prove! This has become my motto coming out of this study. The theories connected to the project validate this as a challenge. However, I believe that a leader worth following exhibits these traits. I am committed to continuously developing my leadership capacity in these areas as I move forward. Throughout this study, while I was challenging the leaders within PUPE, as well as the leaders on the AR team, I was also, more than anything, challenging myself. I have come to appreciate the power and necessity of reflection because it was times of reflection that resulted in my most powerful insights, ideas, and learning.

This study has crystalized my belief that leaders who have the capacity to cultivate psychological safety on their teams, coupled with aligning their words with their actions, create the conditions for community members to do their best work. I wholeheartedly believe that these are essential tools in my leadership toolkit. By consistently nurturing psychological safety and value congruence, I am confident that I can inspire everyone I encounter to achieve extraordinary results, foster innovation, and create an inclusive and fulfilling work environment.

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APPENDIX A

AR KEY ACTIVITIES

AR Key Activities June 2021 – April 2023			Color Coding Key	
			Data Collection	
			AR Team Meeting	
			Interventions	
Cycle and Phase	Date	Activity	Activity description	
Pre-Study	June 2021	Secured Project Sponsor	- ELT and the Associate Dean of Academic Programs agree to serve as the study's project sponsor.	
	August 2021	Research Study Approval	- Research approved by UGA Internal Review Board (IRB)	
Context & Purpose		Comprehensive Administrative Review & News Article Review	- Collected and evaluated data to support the context and purpose of the study.	
		Organizational Culture Assessment	- Reviewed the Org Wide Culture Assessment - Pulled out PUPE data from the Org Wide Assessment	
	June 2021	Focus Group with Potential AR Team Members	- First gathering of potential AR Team members to introduce/meet everyone and see if they would be interested in serving	
	August 2021	CMS 1 Defense	- Report to my Committee about the nature of the system and the problem that will be the focus of the AR Project.	
Cycle 1: An Opportunity to Educate				
Cycle 1 Constructing		Organization Strategic Plan	- This document included a guiding framework and newly articulated organizational values	
	August 2021	AR Team Meeting 2	- Team Building - Celebrated meeting 1 st Critical Milestone - Reviewed AR process and project goals - Explored three key concepts present in the project	
	August 2021	PUPE Staff Committee Meeting	- Reviewed AR process and project goals - Discussed the role they would play in the research project - Explored three key concepts present in the project	
Cycle 1 Planning Action	August 2021	AR Team Meeting 3	- Decided we needed to level set in the organization and ensure we were all clear on defining key concepts used in the study.	
Cycle 1 Taking Action	Sept 2021	Kicked off Education Campaign (Info Session with PUPE)	- Information Session with PUPE Team during Dean's Q&A	
	Sept – Nov 2021	Open Enrollment session for the PUPE team	- Hosted 4 Leading our Values Everyday Workshops covering value congruency and psychological safety	
	October 2021	Critical Incident Interviews	- Conducted 5 Critical Incident interviews	
Cycle 1 Evaluation	December 2021	Researcher Data Analysis	- Analyzed workshop evaluations - Translated Critical Incident Interviews	
	January 2022	AR Team Meeting 4	- Reviewed data gathered this far - Discussed the current state of the organization at large and the effect that may have on PUPE - Begin Intervention planning dialogue - Talked about Bias and Bias Identification	
Cycle 2: An Opportunity to Validate and Innovate				

Cycle 2 Constructing		Workshop Themes	- Collected and categorize information gathered during the workshop
		Level 1 Workshop Evaluations Quantitative Results	- Reviewed all workshop evaluations, collected successes and areas for improvement
		Critical Incident Interview Narratives	- Member checked and shared narratives with AR Team
Cycle 2 Planning Action	February 2022	AR Team Meeting 5	- Team Building - Used the AR Team to test the questionnaire construction - Brainstormed ways to engage a high participation rate
	March 2022	AR Team Meeting 6	- Team Building - Dug into the cycles of Action Research - Critical Incident Activity
	April 2022	AR Team Meeting 7	- Team Building - Reviewed data gathered thus far, including CIT Narratives - Drafted a tentative intervention plan.
Cycle 2 Taking Action	May 2022	CMS 2 Defense	- Gained approval from my committee to implement the proposed interventions and research plans.
	May 2022	PUPE Townhall	- Gave an update on the study, and the Dean encouraged participation in the survey
	May 2022	Launched Psychological Safety and DLOQ survey	- Encouraged members of the team to take the survey.
	June 2022	Researcher Data Analysis	- Analyzed workshop evaluations - Translated Critical Incident Interviews
	June 2022	Conducted Interviews	- Quantitative data looked different than expected. - Conduct interviews to gather more information and context
Cycle 2 Evaluation	June 2022	AR Team Meeting 8	- Team Building - Reviewed PS/DLOQ data - Confirmed agreement on the intervention plan.
Cycle 3: Keeping our Commitments			
Cycle 3 Planning Action Cycle 3 Taking Action	July 2022	AR Team Meeting 9	- Discussed PS/DLOQ quantitative data. - Highlighted that the results were very different from what we expected.
	July 2022	Launched Values Based Self-Assessment and Learning Road Map	- Tool to help community members identify places where their actions are congruent and incongruent with the organization's values.
	July 2022	Hosted Leading our Values Everyday: Psychologically Safety Workshop	- Psychologically Safety Workshop
	July 2022	Hosted Leading our Values Everyday: Leading Congruently Workshop	- Value Congruence Workshop
	Aug 2022	Interviews	- Conducted four interviews to try and further validate findings from the PS/DLOQ survey
	Aug 2022	Focus Group	- Conducted focus group with two intact teams and the PUPE Staff Committee
	Sept 2022	AR Team Meeting 10	- Reviewed the conflicting quantitative and qualitative data
	Oct 2022	AR Team Meeting 11	- Reviewed the conflicting quantitative and qualitative data
	Feb 2023	Launched Values Based 360 Assessment with Coaching	- 360 Assessment and Coaching
Cycle 3 Evaluation	March - April 2023	AR Team Exit Interviews	- Interviewed all the AR Team members individually using a predefined set of questions.
	April 2023	Final AR Team Meeting	- Used the five metaphors activity to close out the work for the AR Team.