New managing and trans-disciplinarity

Contents | Indhold

Seeking New Managerial Perspectives for Value Generation

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Abstract

In this article, we take up some of the suggestions presented in the call for papers emphasizing the connections between the concepts of new management and transdisciplinarity.

Since the aim of the special issue is to explore experiences and studies related to the development of managerial thought, the innovation in managerial activities, and the overcoming of neoliberal managerial mainstreaming approaches, we solicited contributions connected to ways that management may support the overcoming of critical situations, facing the evolution required to reconfigure existing working, professional, and organizational cultures, and how it may be able to deal with an incoming challenging, paradoxical, and contradictory scenario.

On one hand, the emergence of a syndemic era calls for a renewed **interpretation of management** at the institutional, organizational, social, and operational levels. This era refers to a set of interconnected issues related to health, the environment, the economy, society, and biology, arising from the synergistic interaction of two or more diseases and their underlying causes. The evolution of the workplace, marked by the fourth and fifth industrial revolutions, along with the impact of macroeconomic models driving AI diffusion and the changing dynamics between humans and machines, requires innovative organizational development. Additionally, a series of dramatic crises—including the 2001 terrorist attacks, the 2007 financial crisis, demographic and migration challenges, the climate crisis, the COVID-19 pandemic, the Russia-Ukraine war, the Israel-Palestine conflict, and other emerging disruptions—demands organizational learning to address the profound transformation in how people live, work, produce, consume, participate, and exercise their citizenship, alongside their lived work experiences and expertise.

Thinking and developing new forms of management is no longer a luxury but a looming and pressing necessity to deal with volatile, uncertain, complex, and ambiguous environments (VUCA- Bennett and Lemoine 2014). Furthermore, it is necessary to generate ever more fractional organizational processes (Law 2002), with increasing exposition to uncertain and contradictory conditions (Engeström 2008), which seek to change daily practices (Czarniawska 2008) and develop processes of learning from practice and experience.

At stake is the ability of organizations to manage people and dynamic changes as a strategic issue (Carroll and Conboy 2020), as well as the creation of new relationships to work and new models to generate value and productivity (Stiegler 2014).

This requires embracing the gradual emergence of agile work patterns (Harris 2015, 2016), aligned with adhocratic organizational structures (Mintzberg 2009) and hybrid professional cultures (McGivern et al. 2015). To establish and develop these approaches, significant and targeted expansive learning paths are essential (Engeström 2015).

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Seeking New Managerial Perspectives for Value Generation
Giuseppe Scaratti
Silvia Ivaldi
Søren Frimann

On the other hand, addressing this impending evolution requires **a paradigm shift** at both the economic and theoretical levels.

Regarding *the economic aspect*, there is a need to move beyond traditional management principles and consider as well as reflect on new guiding principles and behavioural models that prioritize individuals/persons and the social sustainability of organizational activities. Significant insights in this direction come from sources such as the 2019 Business Roundtable and from the United Nations Principles for Responsible Management Education (PRME):

- Delivering value to customers by upholding the tradition of pioneering companies that meet or exceed customer expectations.
- Investing in employees through training and education to help develop new skills for a rapidly changing world.
- Promoting diversity, inclusion, dignity, and respect within the workplace.
- Engaging with suppliers fairly and ethically.
- Supporting the communities where companies operate by respecting and addressing social needs as well as adopting sustainable practices to protect the environment across all organizational and entrepreneurial activities.
- Shaping work, professional, and organizational cultures to tackle the challenge of generating collective value amid the unprecedented complexities and changes that demand radical transformation.

The challenge is to translate these principles into consistent practices that become deeply ingrained habits—whether for a construction worker in Dubai, by ensuring fair pay and skill development, or for a stockbroker on Wall Street, by promoting ethical rather than fraudulent behaviour—while recognizing the distinct nature of each work environment.

At stake is a reconfiguration, renewal, and regeneration of management, which must address cross-cutting and transversal phenomena and challenges such as generational and cultural differences, digital transformation, work-life balance, new ways of working, innovative and sustainable organizational practices, and the generation of collective value and common goods. The aim is to shift away from traditional managerial models—such as global competition,

mass customization, and neoliberal approaches to management and organizational processes—towards the development of services, new ways of sharing, and a circular and generative economy (Butera 2017; Stiegler 2014).

From a *theoretical perspective*, this paradigm shift involves epistemological and methodological stances.

Epistemological approaches involve reviewing and refining the theories currently used in organizational and managerial studies (Scaratti and Ivaldi 2021; Tsoukas 2009) and developing critical contributions to the field (Bondarouk and Brewster 2006; Janssen and Steyaert 2009). This shift is supported by a growing body of research (Frey and Osborne 2017; Makridakis 2017; Peters 2017) that examines the impact of the Fourth Industrial Revolution on employment, unemployment, and the skills needed for the future workforce, as well as identifying the best training tools and methods for developing those skills (Hecklaua et al. 2016).

A significant, though not exclusive, source of inspiration for future studies and research stems from a theoretical and epistemological foundation rooted in the following areas: the critical management studies perspective (Alvesson and Deetz 2006; Alvesson and Sandberg 2014; Alvesson and Willmott 1992; Alvesson et al. 2008, 2009); theoretical frameworks related to adhocratic and pluralistic organizations (Denis et al. 2001; Mintzberg 1985, 2009; Taptiklis 2005; Whitley 1984); processes of work and professional hybridization (Battilana and Casciaro 2012; Blomgren and Waks 2015; Gümüsay et al. 2020; McGivern et al. 2015; Noordegraaf 2015); and organizational and expansive learning methods (Engeström 2015, 2020; Engeström and Sannino 2021). These approaches seek to discover new and as yet unexplored knowledge that is not currently available or actionable (Scaratti and Ivaldi 2021; Scaratti et al. 2021).

Methodological approaches focus on problem-oriented, problem-solving, and transformative experiences that address societal and environmental issues and challenges. These approaches foster collaborative, action-oriented research across traditional knowledge boundaries through mutual learning processes (Cunliffe et al. 2020). From this methodological perspective, the creation of relevant knowledge begins with the concrete situated experiences of individuals in specific work contexts, enriching our range of observations (Brush et al. 2009; Cassell and Symon 1994). Adopting a prac-

tice-based lens (Feldman and Orlikowski 2011) and a sensemaking perspective (Maitlis and Christianson 2014) in work and organizational studies enables the identification of knowledge embedded in social and organizing life. This knowledge is seen as an ongoing process that is increasingly recognized as complex, dynamic, distributed, mobile, transient, and unpredictable.

At the core of this approach is an *ecocentric perspective* (Allen et al. 2019), which is essential for reshaping traditional views and practices in management, learning, and education. A key element of this strategy is the transdisciplinary approach, where people from different fields collaborate to develop conceptual and methodological frameworks focused on a common issue (Klein 2006). While this process may lead to potential divergences and conflicts, it also fosters the creation of actionable and sustainable knowledge related to the issue under study.

By developing research based on workplace experiences and professional or organizational practices, and moving across and beyond disciplinary boundaries (Nicolescu 2010, 2012), it becomes possible to connect civil society, media, universities, government, industry, and the natural environment. This process generates cognitive knowledge (abstract representations), embodied knowledge (feelings, intuition, imagination), and enacted knowledge (experience and know-how) (Dieleman 2017).

This strong link between creating new managerial trajectories and adopting a transdisciplinary approach highlights that the more complex the managerial challenges, the greater the need for a transdisciplinary approach. Such an approach promotes multistakeholder participation, broadens knowledge and expertise sources (both academic and non-academic), and fosters collaboration, integration, and alignment that go beyond conventional practices.

The contributions presented in this issue exemplify this transdisciplinary effort, working at the intersection of academic players, groups, and communities to develop suitable and relevant knowledge related to organizational and societal challenges.

"Examining the interplay between positive and negative bureaucracy characteristics and job satisfaction: The moderating role of resistance to change for neo-managerial approaches," by Barbara Barbieri, Diego Bellini, Giuseppe Scaratti, Marina Mondo, Roberta Pinna, Maura Galletta, and Silvia De Simone, examines the relation-

ship between positive and negative bureaucratic traits and their impact on job satisfaction, while also considering how resistance to change moderates these effects within the context of neo-managerial approaches.

"What makes me stay here? An action research approach to organisational change," by Maddalena Gambirasio, takes a qualitative approach to understanding the meaning of the good life in a situated organizational context, addressing the possibility of staying at work as a good enough place facing critical events (turnover, large resignations, and widespread mergers and acquisitions). The article presents a case study of an Italian tax and legal firm formed in 2020 from the merger of two accounting firms, encountering problems retaining and attracting experienced talent.

"Is it possible to develop regenerative leadership in the financial sector through action research?" by Lone Hersted explores the development of regenerative leadership through action research. It presents a specific action research project conducted in the financial sector on regenerative leadership, and examines and discusses how action research can be used to foster and develop regenerative leadership.

"An operationalization of TEAL: A catalyst for creating public welfare in a complex society?" by Lykke Mose examines the TEAL paradigm as a neo-management style that fosters more agile, network-based collaboration to enhance public welfare in a complex society. It presents a three-year decentralization experiment in a Danish municipality, where trust and reduced central legislation are expected to increase local autonomy and improve welfare through the implementation of the TEAL approach.

In "What are the potentials of interorganizational collaborative management research in mobilizing leadership agency?", Jan Rohwedder and Søren Frimann explore interorganizational collaborative management research (ICMR) within a Danish research and development project, involving leaders from five major public and private organizations dedicated to leadership development and leadership capacity building, provide a comprehensive review of CMR as a research approach, and offer methodological hints for future interorganizational collaborative management research.

"Generating social capital between people management and dynamic change," by Emanuele Testa and Silvia Ivaldi, presents an

action-research experience that exemplifies innovative ways to create value and organizational models. The focus is on the management of Italian nursery schools, where civil society takes responsibility for microprocesses that ensure the generation of collective value for the community and the maintenance of a connective tissue or social cohesion. The findings emphasize the elements of social capital that were developed, as well as the critical issues that emerged when working within socio-organizational and community contexts.

"The letter of the law: Insights from Italy's anti-poverty measures about managing in social services," by Armando Toscano and Giulio Bertoluzza, examines the impact of newly implemented Italian anti-poverty policies, specifically the inclusion allowance, on the functioning of public–private partnerships. The study also considers third-sector organizations contracted to manage the poverty fund. The findings reveal that the introduction of a new anti-poverty measure has caused significant disruptions in the coordination between public and private social organizations.

A common theme across the various contributions, as noted by Cunliffe et al., is the new managerial perspective as a multifaceted approach in which diverse subjects "work collaboratively and reflexively across boundaries (discipline, functional, community, etc.) in order to address society's problems" (Cunliffe et al. 2020, p. 5).

In this context, the creation of value can be understood as a principle that involves the shared use of public and private resources for the pursuit of public benefit. The challenges lie in supporting the independent initiative of various actors—citizens, associations, public and private players, institutions, foundations, and others—who come together, often in collaborative forms, to pursue the common good, enhance active citizenship, and promote social cohesion and protection. The value generated is the achievement of civic, solidarity, social, organizational, economic, and institutional goals through the capability to manage diverse and often complex forms of collaboration.

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Examining the interplay between positive and negative bureaucracy characteristics and job satisfaction

The moderating role of resistance to change for neo-managerial approaches

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Examining the interplay between positive and
negative bureaucracy characteristics and job satisfaction
Barbara Barbieri
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Giuseppe Scaratti
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Abstract

Traditionally, literature considers public administration as a bureaucratic institution where managers and employees must adhere to rigid structures and procedures. However, a bureaucratic organizational culture can either support employees (e.g., enabling practices) or conversely exerts control (e.g., coercive practices), thus influencing various psychosocial and organizational outcomes, including job satisfaction. Despite the well-recognized features of this bureaucratic structure, few studies have examined its dual effect on job satisfaction. A cross-sectional study was conducted with a sample of 414 managers in the public sector. The results of the hierarchical regression analysis revealed that enabling bureaucracy positively affects job satisfaction, while coercive bureaucracy has a significant and negative impact on job satisfaction. Furthermore, resistance to change moderates the impact of bureaucracy's coercive aspects on job satisfaction.

Keywords: bureaucratic culture, job satisfaction, public administration, resistance to change, JD-R model

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Introduction

In recent decades, there has been a growing emphasis on identifying organizational structures that attract employees and enhance their satisfaction and performance (Kruskovic, Ilic, and Andjelic 2023). Despite this, rigid regulations and hierarchical organizational structures persist within public services, often characterized by bureaucratic red tape (Monteiro and Adler 2021). These models are known to negatively impact the quality of public services (Lapuente and Van de Walle 2020). In contrast, less bureaucratic structures that meet individuals' needs are associated with increased efficiency (Bergman and Fredén 2022). This dual perspective on bureaucracy posits that it can either support employees through enabling practices or control them through coercive practices, influencing psychosocial and organizational outcomes including well-being, job satisfaction, performance, and responses to change (Pascoe, Waterhouse-Bradley, and McGinn 2023). Although these insights, managerial practices have predominantly focused on mitigating the adverse effects of bureaucratic red tape rather than investigating the positive impacts of enabling bureaucracy on work outcomes.

Additionally, the interaction between organizational models, work environment, and individual characteristics significantly influences the potential for organizational change and the achievement of organizational goals. One of the most substantial barriers to organizational change is employees' reaction to these changes (Khaw et al. 2022, for a review). Negative reactions to change can diminish commitment within the public sector (Suzuki and Hur 2019) and adversely affect employees' health (De Jong et al. 2016). Conversely, positive reactions to change can enhance job satisfaction and performance (Khaw et al. 2022). Employees are more receptive to changes perceived as necessary and aligned with their expectations (Warrick 2023). Openness to change, characterized by lower levels of resistance, can mitigate the negative effects of bureaucracy (Sverdlik and Oreg 2022). Given the paucity of studies examining the dual characteristics of bureaucratic models and their subsequent positive and negative outcomes, this study concurrently investigates the possibility that enabling bureaucracy positively affects job satisfaction, whereas coercive bureaucracy negatively impacts job satisfaction in the public sector. Moreover, we investigated different levels of resistance to change along a continuum.

Barbara Barbieri
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Specifically, a lower level of resistance to change may reduce bureaucracy's negative effect on job satisfaction, balancing its impact. While past research has studied resistance to change, it has not fully explored varying levels of resistance and their interaction with enabling and coercive bureaucracy in job satisfaction. This study addresses these gaps by exploring these relationships within the framework of the Job Demands-Resources (JD-R) model (Bakker and Demerouti 2017), using data from 414 managers in the Italian public sector.

The conceptual model is depicted in Figure 1.

Figure 1. Conceptual Model
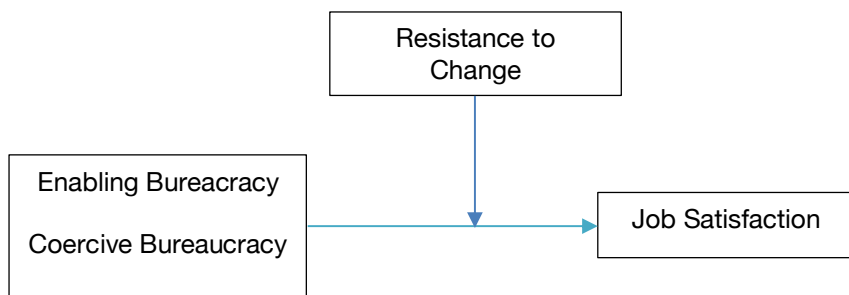
Theoretical Background and Hypotheses

Bureaucracy in a dual perspective: enabling and coercive practices and their positive and negative effects, within the job demands-resources (JD-R) model

Organizations must coordinate individuals and establish efficient processes to achieve their goals. Various organizational structures can be adopted to accomplish these aims, with bureaucracy being a prevalent choice in public sectors. Organizational structure refers to the arrangement of job roles and administrative processes, forming a network of activities that oversee operations and maintain control (Albert 2024). Organizations often rely on high levels of standardization and formalization to achieve control. Standardization establishes procedures and rules that subordinates must follow, limiting their decision-making scope and defining tasks. The higher the standardization, the easier it is to exert control and authority, as decision-

Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

making autonomy is reduced, increasing power distance—the acceptance of unequal power distributions within the organization. Formalization, on the other hand, refers to the extent to which rules, procedures, instructions, and communications are documented in writing. Both increased power distance and reduced autonomy, especially when shaped by written procedures, can be seen as constraints, potentially leading to job stress (Zeuge et al. 2023) and negative outcomes such as reduced job satisfaction (Daouda et al. 2021). Traditionally, bureaucracy is seen as pathology characterized by paperwork and unnecessary or redundant procedures. However, bureaucracy can be viewed from two contrasting perspectives and dimensions: enabling (a positive view) or coercive (a negative view) (Hoy and Sweetland 2000).

Enabling bureaucracy involves formalization that supports employees by clarifying tasks and organizational goals, creating a structured environment that fosters autonomy and competence. In contrast, coercive structures emphasize control and compliance, representing the negative side of bureaucracy (Kaufmann, Borry, and DeHart-Davis 2018) and are linked to the rigid application of procedures and authority (Pandey and Scott 2002). These structures can increase stress, reduce well-being (Sievert et al. 2020), and hinder organizational goals (Pascoe, Waterhouse-Bradley, and McGinn 2023). The impact of bureaucratic models on employees depends on how well they align with organizational needs, with satisfaction increasing when employees perceive such alignment (Jin, McDonald, and Park 2016).

These dual perspectives can be encapsulated within the Job Demands-Resources (Bakker and Demerouti 2007) model. The JD-R model is a theoretical framework used to explore the interplay between organizational and individual resources and demands. Previous research within this model has outlined how job resources (i.e., aspects of the job necessary to achieve work aims) prevent exhaustion and fosters the development of additional resources. Job resources moderate the negative effects of job demands on work outcomes, enabling employees to cope with these demands, thereby improving person-job fit and facilitating the achievement of work goals (Tims, Derks, and Bakker 2016; Demerouti et al. 2021). Conversely, job demands negatively impact work outcomes and other resources, increasing stress and impeding the achievement of

Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

employee aims. Both job resources and demands are antecedents of various organizational outcomes that affect employees' well-being (Kaiser et al. 2020).

Consistent with the JD-R model, coercive bureaucracy may be seen as a job demand that limits autonomy and satisfaction of needs, hindering employees' ability to achieve work and personal goals. Conversely, enabling bureaucracy acts as a job resource, guiding employees in their tasks without obstructing satisfaction related to learning and autonomy. Both demands and resources can influence work outcomes, such as job satisfaction, considered an emotional response stemming from positive job evaluations and linked to factors like commitment, communication, innovation, flexibility, and productivity (Culibrk et al. 2018; Wright and Davis 2003). Centralization and formalization, common in coercive bureaucracies, may reduce autonomy and negatively affect job satisfaction (Cantarelli, Belardinelli, and Belle 2015; Langer, Feeney, and Lee 2017). Conversely, enabling bureaucracies can foster a supportive environment that enhances work outcomes.

In line with the aforementioned literature, we propose the following hypothesis:

H1: Enabling bureaucracy positively affects job satisfaction
H2: Coercive bureaucracy negatively affects job satisfaction

Moderating effects of Resistance to Change: positive reactions viewed as Job Resource and negative reactions as Job Demand

Organizational models can become obsolete over time, creating barriers for employees and necessitating change. Change within organizations can elicit varied reactions from employees, including acceptance or resistance. Resistance to change defined as the psychological disposition toward change (Oreg, Vakola, and Armenakis 2011), involves cognitive, emotional, and behavioral aversion responses (Amarantou et al. 2018). Managers and employees should understand how to overcome such responses. However, resistance to change may manifest as a reaction to change, specifically regarding acceptance or openness to change (Di Fabio and Gori 2016). This study focused on the positive or negative reaction toward change due to the bureaucratic structure. Bureaucratic structures can either

Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

facilitate or hinder the introduction of change. For instance, bureaucratic structures can introduce incentives, modify levels of control and related expectations, promote supervision, or reduce the clarity of aims and define confused rules. These characteristics influence employees' evaluations of their jobs, leading to either positive or negative reactions. On the other hand, employees themselves are instrumental in realizing change within a bureaucratic structure. In both coercive and enabling models, employees may exhibit different levels of resistance to change, which can impact job satisfaction. Depending on their level of resistance to change, employees will decide whether to maintain or modify their initial evaluation of job conditions (Alnoor et al. 2022). This decision is influenced by employees' expectations.

A lack of alignment between employees' expectations (van den Heuvel 2020) and organizational change can negatively impact their well-being and satisfaction (Nery, Franco, and Neiva 2019; Khaw et al. 2022). To moderate these negative reactions, employees should understand the reasons behind the change and its relevance (Warrick 2023). The alignment between employees' expectations and organizational change may depend on various factors.

Khaw et al. (2022) identified factors such as communication, openness to change, and leadership style as influential in organizational change. Other studies have linked resistance to change with acceptance (Piderit 2000; Cheraghi et al. 2023). Acceptance, as a positive reaction or lower resistance to change, enhances job performance and engagement (Zahari and Kaliannan 2023; Alfes et al. 2019). Without positive reactions, the control from coercive bureaucracy can lead to stress. However, lower resistance enables employees to handle job demands more effectively. A lower resistance to change reflects openness (Rehman et al. 2021) and may serve as a resource to reduce negative work context effects. According to the JD-R model, lower resistance, seen as a resource, can moderate the negative impact of coercive bureaucracy or enhance the positive effects of enabling bureaucracy, improving job satisfaction.

Based on the JD-R model, the following hypotheses are developed.

H3: Resistance to change (for lower levels) moderates the negative effect of coercive bureaucracy on job satisfaction, such that the relationship will be weaker.

Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

H4: Resistance to change (for lower levels) boost the positive effect of enabling bureaucracy on job satisfaction, such that the relationship will be stronger.

Materials and Methods

Participants and Procedure

The study was conducted in Italy in 2023 in a sample of 414 managers employed in Public Administration. Data were collected using a convenience sampling method. Participants completed a questionnaire during an online survey, providing their informed consent beforehand. Anonymity was ensured through the online process. Out of all managers, 266 were men (64.3%) and 148 were women (148%). The average age of participants was 49.1 years ($SD = 9.74$). The average length of employment in their public organization was 15.2 years (SD = 10.5). Among managers, nearly half (49%) had experience ranging from 0 to 13 years of experience in organizations, while 36.7% held between 14 and 27 years of organizational experience. The remaining of them (14.3%) had accumulated organizational tenure spanning from 28 to 42 years.

Control variables

Questions referring age, gender, and organizational tenure in public administration were included as control in hierarchical regression. Gender was categorized into three categories (1 = male; 2 = female; 3 = other) age in three categories (1 = 18-34; 2 = 35-54; 3 = > 54) and organizational tenure in public administration in three categories (1 = 0 – 13; 2 = 14-27; 3 = 28-42).

Measures

The measures utilized in the present study have previously been applied in work contexts, demonstrating good reliability and validity.

Bureaucracy was measured using the 12-item Hoy and Sweetland (2001) scale, which consists of two dimensions: coercive and enabling bureaucracy. Examples of items for coercive bureaucracy include: "The administrative hierarchy obstructs employees' achievement". For example, enabling bureaucracy, an example is "Administrative rules help rather than hinder". Participants rated

Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

their agreement with each item on a 5-point Likert scale, ranging from completely disagree (1) to completely agree (5).

Resistance to change was assessed using the Italian version of Oreg's (2003) scale, adapted by Bobbio, Manganelli, and Filippini (2008). The original scale consisted of 15 items divided into four dimensions: emotional reaction, cognitive rigidity, routine seeking, and short-term focus. Examples of items include routine seeking, "I prefer having a stable routine to experiencing changes in my life"; for emotional reaction, "When I am informed of a change of plans, I tense up a bit"; for short-term focus, "Changing plans seems like a real hassle to me"; and for cognitive rigidity, "I do not change my mind easily". Participants expressed their agreement based on a 7-point Likert scale, ranging from absolutely false (1) to completely true (7). Cognitive rigidity refers to individuals' difficulty in altering their perspectives, while routine seeking reflects their tendency to follow established routines. Emotional reaction refers to the degree to which individuals experience negative emotions, such as anxiety and lack of enthusiasm when faced with imposed change. Short-term focus pertains to how much individuals focused on the immediate negative effects of change. In this study, the dimensions of routine seeking and cognitive rigidity were utilized.

Job satisfaction was evaluated using the Work-Related Quality of Life scale (WRQLs) in its Italian version (Garzaro et al. 2020). The scale included eight items related to job satisfaction. An example item is: "The working conditions are satisfactory". Participants indicated their level of agreement with each item on a 5-point Likert, where 5 represented "complete agree" and 1 represented "completely disagree".

Data analysis
At first, exploratory factor analyses were conducted, and the measurement model was validated with SMART PLS4 to determinate the contribution of each item to the latent variables. Composite Reliability (CR) and average variance extracted (AVE) were calculated for the constructs in this model to examine the convergent and discriminant validity of each variable in this study. Additionally, scale reliability was assessed using Cronbach's alpha values. Harman's

Examining the interplay between positive and
negative bureaucracy characteristics and job satisfaction
Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

single-factor test was performed to investigate the potential effect of the common method bias (CMB) arising from the use of the self-report instruments. A hierarchical regression was conducted into two steps using IBM SPSS 20 to test the study hypothesis. The regression analysis included the examination of the potential effects of control variables (i.e., gender, age, duration of employment) on job satisfaction. Furthermore, the PROCESS macro was used to test moderation effects.

Results

According to the exploratory factors analysis, bureaucracy encompassed two factors: coercive bureaucracy and enabling bureaucracy. Likewise, resistance to change consisted of two factors: cognitive rigidity and routine seeking.

As shown in Table 1, the reliability values (Cronbach's alpha and composite reliability) for all the constructs were above 0.7, indicating higher scale consistency. Moreover, the average variance extracted was above over 0.5, representing acceptable convergent validity. The AVE root square was calculated to examine the discriminant validity, showing that these values were greater than its correlation with other constructs, as reported in Table 2. With regard to the measurement model, the fit indices showed a good fit ($\chi2 = 1197.633$ df = 591, p =0.000, $\chi2/df$ =2.026; CFI =945; TLI = 938; RMSEA = 0.046; SRMR = 0.047). As regard the common method bias (CMB), the Harman's test showed that a single factor explained just 26.43% of the variance (less of the 50%). Therefore, the potential effect CMB is not a concern in this study.

Table 1. Cronbach's Alpha, Composite Reliability, and Average Extracted Variance Values.

	Cronbach's alpha	Composite reliability	Average variance extracted
Coercive Bureaucracy	0.829	0.838	0.505
Enabling Bureaucracy	0.893	0.861	0.523
Job Satisfaction	0.894	0.886	0.515
Cognitive Rigidity	0.909	0.878	0.515
Routine Seeking	0.899	0.900	0.749

Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

Table 2. Average Extracted Variance Root Square Values (on the diagonal) and Correlations Coefficients.

	Coercive Bureaucracy	Enabling Bureaucracy	Job Satisfaction	Cognitive Rigidity	Routine Seeking
Coercive Bureaucracy	**0.711**				
Enabling Bureaucracy	-0.369	**0.723**			
Job Satisfaction	-0.373	0.645	**0.718**		
Cognitive Rigidity	0.246	-0.080	-0.184	**0.717**	
Routine Seeking	-0.225	0.073	0.200	-0.750	**0.866**

Descriptive Statistics

Correlations, means, and standard deviation among variables under study are reported in Table 3. Enabling bureaucratic was positively correlated with job satisfaction, and negatively correlated with resistance to change (cognitive rigidity), resistance to change (routine seeking), and coercive bureaucracy. Coercive bureaucratic was negatively correlated with job satisfaction and positively correlated with resistance to change (cognitive rigidity) and resistance to change (routine seeking). Referring to the control variables, gender, age, and duration of employment were not significantly correlated to bureaucracy sub-dimensions and job satisfaction.

Table 3. Descriptive Statistics and Correlations (N = 414).

	M	SD	1	2	3	4	5	6	7	8
1. Gender	1.36	0.48	1							
2. Age	49.14	9.75	-0.076	1						
3. Dur ation of Employment	15.21	10.50	-0.004	0.632**	1					
4. Enabling Bureaucracy	3.00	0.79	-0.037	-0.059	-0.022	1				
5. Coercive Bureaucracy	3.14	0.86	-0.003	0.015	0.017	-0.272**	1			
6. Cognitive Rigidity	3.61	1.20	0.001	-0.151**	-0.062	-0.038	0.201**	1		
7. Routine Seeking	3.47	1.52	0.055	-0.087	0.034	-0.049	0.227**	0.664**	1	
8. Job Satisfaction	3.19	0.85	-0.029	-0.027	-0.001	0.552**	-0.314**	-0.178**	-0.175**	1

*Note: ** $p < 0.01$;*

Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

Hypothesis testing

The regression analysis results in Model 2 (Table 4) revealed a significant positive impact of enabling bureaucracy on job satisfaction ($\beta = 0.507$; $p < 0.001$) and a significant negative impact of coercive bureaucracy on job satisfaction ($\beta = -0.145$; $p < 0.01$). Cognitive rigidity and routine seeking dimensions were negatively related with job satisfaction but their effects were not statistically significant. Regarding the control variables, neither age, gender, tenure in organization had a significant impact on job satisfaction in both Model 1 and in Model 2.

Given the high impact of enabling bureaucracy on job satisfaction, this independent variable could serve as a control variable in the hierarchical regression analysis when examining the moderation effect of resistance to change dimensions on the relationship between coercive bureaucracy and job satisfaction. Therefore, to properly assess this relationship, according to the study hypothesis, a linear regression analysis was conducted to test the moderating effect of resistance to change dimensions on the relationship between coercive bureaucracy and job satisfaction, excluding the potential confounding effect of enabling bureaucracy.

Regarding the moderation effects, the results from the linear regression analysis, conducted using macro process, indicated that resistance to change (cognitive rigidity dimension) moderates the negative effect of coercive bureaucracy on job satisfaction. The Beta interaction coefficient was 0.083 with confidence Interval (CI) ranging from 0.0330 to 0.1342. Particularly, the simple slope test revealed that the negative impact of coercive bureaucracy on job satisfaction was not statistically significant at higher level of cognitive rigidity ($\beta = -0.125$; $CI = -0.258$ to 0.008), but significant at mean and lower levels ($p < 0.001$).

Furthermore, routine seeking moderates the negative impact of coercive bureaucracy dimensions on job satisfaction ($\beta = 0.083$; $CI = 0.024$ to 0.143). Specifically, the negative impact of coercive bureaucracy on job satisfaction was higher at lower level of routine seeking ($\beta = -0.346$; $CI = -0.448$ to -0.245) compared to higher levels of routine seeking ($\beta = -0.144$; $CI = -0.280$ to 0.007).

The results did not confirm the moderation effect of resistance to change dimensions on the relationship between enabling bureaucracy and job satisfaction ($p > 0.05$).

Examining the interplay between positive and
negative bureaucracy characteristics and job satisfaction
Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

Table 4. The hierarchical regression results of the association of age, gender, duration of employment, enabling and coercive bureaucracy, cognitive rigidity, routine seeking with job satisfaction (N=441).

	Job Satisfaction					
	Model 1			Model 2		
Model 1	β	t	p	β	t	p
Gender	-0.028	-0.564	0.573	-0.006	-0.145	0.884
Age	0.002	0.028	0.978	0.013	0.280	0.780
Duration of employment	-0.042	-0.729	0.466	-0.024	-0.515	0.607
Model 2						
Enabling Bureaucracy				0.507	12.183	0.000
Coercive Bureaucracy				-0.145	-3.379	0.001
Cognitive Rigidity				-0.095	-1.746	0.081
Routine Seeking				-0.053	-0.969	0.333
Adjusted R^2	-0.005			0.341		
Omnibus test of the regression		$F(3, 410) =$ n.s			$F(4, 406) = < 0.001$	

Discussion and Conclusion

The study examined the dual perspectives of bureaucratic structures, enabling and coercive dimensions, and their effects on job satisfaction among public sector managers. Additionally, we investigated the moderating role of resistance to change, focusing on lower levels of resistance as a positive reaction toward change. Our findings confirm that enabling bureaucracy positively impacts job satisfaction (H1), while coercive bureaucracy negatively affects it (H2), consistent with prior research (Hoy and Sweetland 2000; Kaufmann, Borry, and DeHart-Davis 2018) and the Job Demands-Resources model (Bakker and Demerouti 2007). Enabling bureaucracy supports employees, enhancing competence and autonomy, thus improving job satisfaction. Conversely, coercive bureaucracy imposes control and rigid rules, increasing stress and reducing satisfaction.

Moreover, our findings reveal the moderating role of resistance to change between coercive bureaucracy and job satisfaction. Specifi-

Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

cally, lower resistance to change indicating a positive reaction toward change, through routine seeking behaviors, helps mitigate the negative impact of coercive bureaucracy on job satisfaction, thereby confirming our hypothesis (H3). Lower levels of routine seeking serve as a job resource, helping managers adapt operation rules and overcome bureaucracy's negative effects (Warrick 2023), leading to higher satisfaction. These findings align with the JD-R model, which posits that job resources can buffer the negative effects of job demands. Interestingly, higher levels of resistance to change, in terms of cognitive rigidity indicating a negative reaction to change, also help reduce the adverse effect of coercive bureaucracy. Managers who are less open to change appear to manage bureaucratic demands more effectively, experiencing less negative impact on job satisfaction. Cognitive rigidity acts as a coping strategy, facilitating compliance with norms and expectations and fostering a stable cognitive environment where managers maintain the status quo.

The study found no interaction between enabling bureaucracy and resistance to change, not supporting H4. Enabling bureaucracy significantly impacts job satisfaction ($\beta = 0.507$; $p < 0.001$), while resistance to change has a low, non-significant effect ($\beta = -0.095$ and $\beta = -0.053$). The correlation between enabling bureaucracy and resistance to change is not significant, suggesting enabling bureaucracy impacts job satisfaction independently of resistance to change, encouraging adaptability.

This study engages with the ongoing debate triggered by Weber's foundational work on bureaucracy as a rational organizational model. Weber's model is defined by an efficient division of labor, clear hierarchy, norms, and impersonal relationships to ensure the proper application of laws and procedures based on legality and equality. The contrast between enabling and coercive bureaucracy highlights the gap between Weber's ideal type and the negative aspects of bureaucracy, such as rigidity, inefficiency, and excessive regulation. The rise of new Taylorist approaches, driven by advanced technologies, emphasizes efficiency at the expense of purpose and employee motivation, potentially undermining efforts to create meaningful work environments and balanced organizational processes.

Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

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Examining the interplay between positive and
negative bureaucracy characteristics and job satisfaction
Barbara Barbieri
Diego Bellini
Giuseppe Scaratti
Marina Mondo
Roberta Pinna
Maura Galletta
Silvia De Simone

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Examining the interplay between positive and
negative bureaucracy characteristics and job satisfaction
Barbara Barbieri
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Giuseppe Scaratti
Marina Mondo
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What Makes Me Stay Here?

An Action Research Approach to Organisational Change

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Abstract

This paper takes a qualitative approach to understanding the meaning of the good life in a situated organisational context, addressing the possibility of staying at work as a good enough place, even though it is facing critical events (turnover, mass resignations, and mergers and acquisitions). The paper presents a case study of a tax and legal firm that was formed in 2020 from the merger of two accounting firms and that is having difficulties attracting and retaining experienced talent. The article aims to explore a concrete organisational case in which people are grappling with the decision to remain with the firm (legacy and persistence) or leave in search of new professional opportunities (innovation and change). Epistemological and methodological implications are highlighted, focusing on the research object as a heterotopic text in which various languages, voices and practices are diffractionally assembled (Deleuze and Guattari 1987), interweaving various discourses and practices (Cunliffe and Locke 2020).

Keywords: action research, qualitative approach, organisational belonging, expansive learning, transformative practices

Introduction

The acronym VUCA (volatility, uncertainty, complexity, ambiguity) (Bennett and Lemoine 2014) aptly describes the situation in which working people today face internal and external pressures and stresses, experience plural and diverse approaches to the same work task, and are experiencing a fragmented relationship (Law 2002) with organisational processes of differentiation and integration (Czarniawska 2008).

Events such as mergers and reconfigurations of work, along with professional and organisational processes and cultures, increase the criticality of employees' relationships with work, requiring new balances between the objectives at stake, design elements (load, safety, resource allocation), autonomy and evaluation, participation and involvement, valorization and growth. Hence, increasingly widespread employees detachment from work manifest itself through multiple phenomena (Klotz et al. 2021; Wartzman 2017). Gallup's 2024[1] report titled *The State of the Global Workplace* states that 59% of the world's employees are 'quiet quitting' (not engaged) and 18% are 'loud quitting' (actively disengaged), while only 23% are 'thriving at work' (engaged). The widespread disaffection from work highlights a changed relationship between people and their work and the meanings that they attribute to it, requiring a different approach to studying the problems generated by concrete work experiences in the specific contexts considered.

This paper focuses on a specific case characterised by the dilemmatic dynamics of permanence versus exit from the work context, highlighting the epistemological and methodological implications that allow the production of knowledge capable of representing the plurality of voices in the field and the different operational practices involved. In this work, the concept of the "good life" becomes central. In this context, it refers to the possibility of finding satisfaction and fulfillment within a workplace, even when it is undergoing significant changes and challenges, such as turnover, mass resignations, and mergers. The term does not imply a perfect or ideal life but rather a "good enough" working life condition where individuals can choose to stay and find a sense of continuity and belonging (legacy and persistence) or, conversely, feel the need to leave and seek new professional opportunities (innovation and change). In this case study, the idea of the "good life" is explored

through the experiences of individuals who consider whether to stay in an organization that, despite facing difficulties in retaining talent and attracting new professionals, might still represent a fulfilling work environment.

The paper starts with a description of the organisational context considered, highlighting its characteristics and organisational structure. It then details the need for intervention and the methodological approach adopted. Finally, the main findings are reported and recommendations for transformative actions are made.

Theoretical Background

The theoretical perspective of this research is related to modes of intervention in organisations that generate knowledge and the capacity for transformation (Scaratti et al. 2021). In this sense, the researcher who intervenes in organisational contexts is able to produce knowledge by supporting and sustaining processes inherent in specific work objects and prefiguring hypotheses of transformation and change (Testa et al. 2022). The aim of such an approach is, therefore, to simultaneously develop knowledge and create change within organisations, starting from real, complex and situated problems. Situativity is a key dimension that requires researchers acting in organisations to step into the natural context and move within social situations. This requires that the various stakeholders involved be available and that the stakeholders and the researchers negotiate the adoption of methodological options. At stake is the possibility of developing a relationship of trust between the researchers and the actors in the organisational context, enabling the generation of relevant knowledge and ecologically grounded and shared orientations to action (Galuppo and Ivaldi 2021). In this context, the researcher assumes an orientation connected to action research through interaction with the people who inhabit the organisational context, promoting processes of evolutionary transformation and realistic change. Hence, the researcher needs to exercise critical thinking about their assumptions related to the relational, organisational and institutional sustainability of the processes envisaged.

The adoption of such a situated, relational, transformative and reflexive epistemological approach entails specific methodological and operational implications. It involves valorising the plurality of existing voices, discourses and practices (Cunliffe and Locke

2020) and creating a space for dialogue and confrontation with different perspectives.

On the operational side, the researcher must be able to constantly adjust their positioning as they are immersed in a complex relational reality. This implies continuous critical reflection on their role and the interpersonal and systemic dynamics that develop in the work context (Shotter 2010), as well as competence in conflict management and building trusting relationships. Below, the specific context in which the action research intervention was developed is detailed. This is a central element since, as previously pointed out, this approach is developed and evolves according to the organisational context in which it is applied.

Organisational Context

The firm at which the action research process presented in this paper was carried out has a history of more than 20 years, years that have been marked by profound changes. Specifically, the path of the company's birth and growth can be divided into three phases that have led to the current configuration. First, the organisation was founded in 2000 by two partners who decided to create their own company to offer small and medium-sized enterprises (SMEs) dedicated professional services. A few years later, in 2008, two different firms merged to create an association of professionals who specialised in providing tax and administrative consulting, as well as the management of insolvency proceedings, to SMEs located in the Bergamo area.

Each of these two firms expanded over the years, leading them, in 2019, to employ 50 and 30 people, respectively, including accountants, lawyers and support staff. In 2020, these two firms merged, creating the current organisation, which is dedicated to providing consulting services for companies in the Bergamo and Verona areas. Bergamo and Verona are both cities in northern Italy with diversified and solid economies, benefiting from their strategic location and well-developed industrial and commercial networks. Bergamo has a long industrial tradition, particularly in the mechanical, machinery manufacturing and textile sectors. In recent years, Bergamo's economy has diversified, incorporating advanced sectors such as mechatronics, renewable energy and biotechnology. The city is known for its medium- to large-sized companies, which

often operate in international markets, and for its dynamic entre-preneurial culture. Verona, on the other hand, is renowned for its contribution to the agri-food sector, being one of the main centres for the production and distribution of Italian wines and agricultural products. In summary, both Bergamo and Verona are cities with strong, well-structured economies, offering various employment opportunities in industry, services and international trade that con-tribute to their socioeconomic development. For this reason, the firm studied is called upon to respond to complex and diversified demands from SMEs in these areas, providing specialised legal and financial support.

Today, the organisation has a staff of more than 95 individuals, including 46 professionals who work together to guide companies through the challenges and changes that accompany the growth of their businesses. The company supports Italian SME entrepreneurs in business management, providing advice and concrete solutions in the tax, administrative, financial and legal fields. The aim is to of-fer small and medium-sized industrial and commercial companies professional services dedicated to helping them develop in ways that generally characterise only large companies—in other words, a complete, integrated and multi-disciplinary consultancy service that can guide entrepreneurs in every aspect of their businesses.

Internally, the firm is characterised by a pyramid structure con-sisting of eight distinct levels: senior partners, partners, senior man-agers, managers, senior associates, associates, practitioners and sup-port staff; the latter provide administrative management, document preparation, practice management and communication with clients.

Demand from Management

The first contact between the researcher and the firm arose from a demand for change articulated by the senior partners, who were concerned about the signs of fatigue and unease in their workplace. Subsequently, interviews were conducted with senior partners, which led to the emergence of three key issues that constituted the crucial premises of the action research intervention presented in this paper. The first is the ways in which various mergers have im-pacted the organisation, namely, the fragmentation and dislocation of the firm. Specifically, the firm comprises four sites located at some distance from each other. This physical dispersion affects the

organisational life of the firm and the working practices of staff, for whom it is a source of fatigue. Another key issue resulting from the mergers is the presence of different organisational cultures. Despite the fact that the firm established its current structure in 2020, different values, beliefs, knowledge and assumptions, linked to old affiliations, seem to remain within the firm. The last central premise that emerged from the interviews is the presence of three distinct groups of employees based on their roles and areas of competence: support staff, accounting professionals, and legal professionals.

The levers that drew attention to the need for researcher support and accompanying work in a process of organisational change are, therefore, related to the presence of a plurality of voices, groups and memberships. There is a need to manage this organisational complexity, starting by developing solutions to real problems by defining trajectories and operational paths capable of diffractionally assembling languages, voices and practices (Deleuze and Guattari 1987).

Methodological Approach

Responding to the demand for intervention and identifying the key issues affecting the firm enabled the researchers to adopt an approach capable of navigating the organisational complexity that emerged. To meet the need for plurality, it was decided to implement an organisational listening exercise capable of putting the firm's employees and professionals at the centre, thus allowing the different areas of criticality to emerge from the organisational context. Therefore, the main objective of the intervention was to intercept the different voices to identify the areas in need of improvement and to activate organisational reconfiguration processes. The listening phase was structured to collect feedback and suggestions from the participants in the study, with a focus on organisational processes such as recruitment, retainment, employer branding and employee rewards.

Qualitative research (Zucchermaglio et al. 2013; Scaratti 2021) allowed for an in-depth and detailed understanding of the employees' experiences, perceptions and motivations, and an exploration of the personal feelings and reasons that drive the employees to adopt behaviours consistent with them. Specifically, the action research activity was structured in three main phases: individual in-

terviews (Phase I), discussion groups (Phase II) and working tables (Phase III).

During Phase I, several employees who held positions of responsibility in the firm and were considered by the firm to be privileged interlocutors were interviewed. Seven semi-structured interviews were conducted to begin exploring the organisational climate. In Phase II, four focus groups were conducted with participants selected by the senior partners, which made it possible to deepen and broaden the view of the themes that emerged during the interviews.

The conversational interactions that took place during the interviews and focus groups were audio-recorded and then transcribed verbatim. The transcripts were thematically analysed, as outlined by Braun and Clarke (2006). An inductive, data-driven analysis was adopted, where coding took place without the researcher applying analytical preconceptions. This approach is consistent with the theoretical and epistemological setting of the study, as it highlights the specificities of the observed context. The phases of the analysis included familiarisation with the data, the generation of initial codes, the identification of broad themes, the revision and refinement of the themes, the definition and naming of the themes and the production of the final report.

After these initial exploratory phases and the development of an understanding of the study's internal criticalities, the action research initiated shared design work, structured by working tables (Phase III). These were supervised by the researchers but managed by a manager selected by the researchers and the senior partners. The working tables turned out to be an integral part and outcome of the action research, activating the project based on the critical issues identified through the interviews and focus groups. At this stage, the researchers passed the responsibility of continuing the project to the participants themselves, making them the protagonists in the process of change made possible by the action research intervention.

Results

The analysis of the data collected through the interviews and focus groups made it possible to identify the main issues that caused fatigue and concern among the study participants. Through these qualitative methods, it was possible to gain an in-depth insight into the experiences, perceptions and concerns of the individuals in-

volved. The interviews provided an opportunity to gather the personal narratives of the interviewees, while the focus groups enabled the observation of group dynamics and discussions that revealed common and shared problems. This process prepared the basis for the working tables, which provided opportunities for structured discussion among the various participants in the study. During these working tables, the collected data were discussed and analysed, and efforts were made to find practical and shared solutions. In this sense, the preliminary organisational listening phase was a crucial element, as it allowed the central themes of discontent to emerge clearly and systematically. The main areas of discomfort and concern were highlighted, providing a solid basis for further discussion and action.

Perceptions of Vagueness

The Organisational Model. The 2020 reorganisation introduced a new organisational model to the firm, aimed at supporting the expansion resulting from the recent merger. However, this new set-up was greeted with detachment by the firm's support staff and professionals. They saw the model as an imposition from above, disconnected from established working practices. In particular, the structural change remained largely theoretical, with little practical application, creating a discrepancy between what was planned and what was implemented. One employee commented as follows:

> One is a senior associate, and the other a junior associate, but in concrete terms, what does that mean? Nothing. It's not that on a project there is a senior, a junior and a trainee. The trainee leads, the junior does the work, the senior takes the responsibility, so there are different roles, so there is a difference. In this case, that is not the case. It's just an economic difference.

The Role of the Manager. Another critical point is the role of the new managers created by the reorganisation. Despite the new hierarchical structure, the managers are not recognised by support staff, who tend to bypass them to address their bosses directly at the top, as expressed by the following comment:

> I know that I am not recognised as a partner…it is often perceived that they go to the person above me for help.

The Role of Partner: The roles identified within the firm are often perceived as empty labels with no real meaning. The difference between one role and another, as well as their career paths, is determined on a personal basis and linked mainly to the economic remuneration offered. This approach renders appointment as a partner a matter without substantial meaning, as there is no real recognition of the asymmetry between employees. One participant explained this as follows:

> It's not that on a project there is a senior, a junior and a trainee. The trainee leads, the junior does the work, the senior takes the responsibility, so there are different roles, so there is a difference. In this case, that is not the case. It's just an economic difference.

The Appraisal Process. The reorganisation introduced an evaluation process similar to the 360° model, in which all employees can evaluate each other. However, this method exacerbates the perceived lack of asymmetry by allowing employees to evaluate their superiors. One participant commented on this as follows:

> It does not recognise anything, it devalues, it dismantles all the work that has been done, so I actually asked: "Let me get this straight, does the receptionist evaluate me?"

Career Progression. One process that may be clear in theory but is vague in practice is career progression. Professionals, in particular, claim to have seen numerous inconsistencies between what is stated and what is implemented. Often, the evaluation criteria for moving up the ladder have been varied or even ignored. One participant commented as follows:

> There also needs to be clarity on what are the growth mechanisms for those who are already senior partners, but that must never change again, because unfortunately, since 2015 [since I have been here], they have changed 20 times.

Lack of Tuning

Collaboration. As seen above, the firm has seen a significant increase in the number of employees and professionals through numerous mergers. This has led to a complete reorganisation of the structure of the firm in several respects. First, space was reorganised: people who had been working in the same office for years were moved to facilitate contact and collaboration with new colleagues. However, this change encountered some difficulties as employees showed resistance to leaving established collaborations in favour of the new working relationships required by the reorganisation. The possibility of effective collaboration is further hampered by the physical distance between the different locations. One participant commented as follows:

> The real issue is the will of the people. I would like to do it, and then I find it impossible because I believe that the other side does not want to mix.

Fairness. One element that has generated discontent within the firm, and in some cases led to some employees leaving, is the lack of fair treatment. In particular, there are disparities in economic compensation, which seems to be a consequence of mergers between different offices and the presence of different professional groups. One participant commented as follows:

> The inequality of internal treatment, in my opinion, is also very much related to the mergers that have been made; different firms that are merged, that have different remuneration policies, put together, automatically there is a disparity that, in my opinion, has never been taken into account.

Sense of Belonging. The numerous mergers that have affected the firm in recent years have created difficulties with professional identification. In particular, there still seem to be marked boundaries between the different firms that have been merged under one name, preventing a common and widespread sense of belonging. One participant commented as follows:

I still see rigidities in collaborating between people from different firms.

Professional Practices. One difficulty that has emerged, linked to the mergers that have taken place, is the ability to adapt working methods to the new practices and procedures required by the firm. Specifically, following the reorganisation, an attempt was made to adopt a common and shared executive model to standardise operations. However, some employees have shown a reluctance to abandon the professional methods they had been using for years in favour of the requirements of the new company. One participant commented as follows:

We are trying to have the same...the same methods, procedures...it's difficult a little bit because of the merger, but especially because we are talking about accountants who have perhaps been working for more than 10–20 years in the same way, and to change the way they approach it, the way they work, is complicated.

In conclusion, the 2020 reorganisation, aimed at supporting the firm's expansion through new mergers, was perceived by workers as an imposition disconnected from established practices. The structural change, which remained largely theoretical and poorly implemented, revealed a discrepancy between planning and practical implementation. The hierarchical model introduced was not recognised at the operational level, generating confusion and inefficiency. The perceived vagueness is exacerbated by the lack of adaptation of working methods to new requirements, ineffective leadership and insufficient integration of new colleagues, creating a fragmented and uncooperative environment. The evaluation process and career progression are perceived as vague and influenced by economic rather than meritocratic criteria. Finally, the lack of fairness and a shared sense of belonging have further fuelled discontent and a resistance to change.

The action research process, by implementing several organisational listening sessions, was able to identify the critical issues arising from the various mergers and reorganisations that have impact-

ed the firm. Table 1 summarises the insights that emerged, providing a starting point for structuring the working tables.

Table 1. Critical Issues

Criticalities that Emerged	
Perception of Vagueness	*Lack of Attunement*
Organisational model	Collaboration
Role of manager	Equity
Role of partner	Sense of belonging
Appraisal process	Professional practices
Career progression	

Discussion

The empirical data collected through the action research project highlight the main causes of fatigue that led workers in this company to ask, "What Makes Me Stay Here?" The causes identified include several factors, ranging from working conditions and internal relational dynamics to expectations of professional growth and work–life balance. These factors were carefully analysed and categorised to better understand how they influenced the participants' motivation to remain part of the firm.

The action research demonstrated the effectiveness of a situated, relational, transformative and reflective approach in the organisational context. This approach facilitated the management of organisational complexity by combining different perspectives and operational practices. This made it possible to recognise and value the different perspectives of workers, integrating feedback and suggestions into the decision-making process. Specifically, based on the data collected, the organisation's management has committed to implementing transformational interventions to create an environment where people can work with serenity. These interventions include implementing work flexibility policies, programmes to support psycho-physical well-being, team-building activities to strengthen team spirit and continuous training initiatives to foster professional development. In addition, regular feedback mecha-

nisms were set up to monitor the organisational climate and to intervene promptly in any critical issues.

In conclusion, the action research project not only provided a clear snapshot of the existing problems but also indicated a concrete path towards significantly improving the well-being of the participants in the study. The active participation of workers in the research and transformation process increased their sense of belonging and involvement, helping to create a more open and collaborative organisational culture.

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Note

1 https://www.gallup.com/workplace/349484/state-of-the-global-workplace.aspx

Is it possible to develop regenerative leadership in the financial sector through action research?

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Abstract

Due to the global socioecological crisis and increasing environmental concerns, there is an urgent need for new ways of leading that take more responsibility for the environment, the climate, the well-being of employees and citizens, and the social aspects of our society in general. There is an urgent need to more consistently work with both environmental and social sustainability in mind.

Based on this challenge, this study is centered around the development of *regenerative leadership* in the financial sector through *action research* as an inquiry to simultaneously learn, change, and produce knowledge. The study's primary research question is:

Is it possible to develop regenerative leadership in the financial sector through action research?

In the first part of the paper, the background of the project and the basic notion of regenerative leadership will be explained. In the second part, a pilot project based on action research focused on the development of regenerative leadership in the financial sector will be presented, including the research inquiry and some brief illustrative examples (adjusted to the scope of the paper). Finally, the

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Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

outcomes of the project and the use of action research for the development of regenerative leadership in the financial sector will be discussed.

Keywords: Regenerative leadership, action research, leadership development, financial sector.

Background

The background and motivation for the pilot project is a need for change at many levels. Today, we are experiencing a socioecological crisis at a global scale that includes complex challenges such as climate change, pollution, a lack of biodiversity, poverty, social inequality, conflicts, and wars. In addition, more and more people are suffering from stress and a lack of motivation in relation to their daily work. Phenomena such as "quiet quitting," fatigue, and burnout have become more widespread in the wake of COVID-19, with employees questioning their work conditions, salaries, and the treatment they receive at work (Harter 2021). Change is needed in organizations all over the world. We cannot continue to reproduce old patterns that are ruinous to both the planet and the people.

In the financial sector, the work environment is usually characterized by high speed and high demand for effectiveness which are controlled by advanced electronic systems for performance measurement. These systems produce a high level of productivity, but unfortunately, they also tend to create high levels of stress and anxiety. A 2024 study from the Financial Association (in Danish, the Finansforbundet) shows that almost every 5th member of the association is in the risk zone for developing health-threatening stress. Out of 36 industries, the financial sector is ranked as the 9th most stressful (Thorbech 2024). High speed and stress have now become a worldwide problem that affects the life quality of a growing part of the population. The German sociologist Hartmut Rosa uses the terms "social acceleration" (2015) while the South Korean–German philosopher Byun-Chul Han (2015) uses the term "burnout society" to point out that stress and exhaustion are not just individual experiences, but an outcome of societal conditions.

Apart from the high production of stress, the financial sector has a significant impact on the environment and society in general, with the banks channeling large cash flows across the globe. The

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

banks play a significant role in the financial system on a global scale and have a significant impact and a big responsibility in relation to our society and eco-systems. The inspiration for the project was the idea of regenerative leadership (Wahl 2016; Hutchins 2022; Hutchins and Storm 2019). In the project we would figure out whether it is possible to inspire new ways of leading to create change in the financial sector. The basic assumptions and the design of the project will be unfolded in the following paragraphs.

Regenerative leadership

Our times and the overall eco-social crisis call for changes in our entire way of thinking about and practicing leadership and require the ability to think in more systemic and relational ways. So far, organizations and society have mainly relied on linear and one-dimensional attempts to find solutions to complex problems, even though everything points to a need to develop a more integrative understanding of large complex contexts.

The idea of regenerative leadership (Hutchins 2022; Hutchins and Storm 2019; Wahl 2016) draws on many different sources that have been inspired by quantum physics, systemic thinking, and complexity theory—ideas developed by pioneers such as Gregory Bateson (1972, 1979), Henri Bortoft (1996, 2012), Fritjoff Capra and Pier Luigi Luisi (2014), and many others – for instance, the Norwegian philosopher Arne Naess (1974) and his ideas on *deep ecology* and *ecosophy* as well as the theories of archetypes and the collective unconsciousness of Carl Gustav Jung (1991), "Theory U" developed by Otto Scharmer (2007), and economic theories developed by Kate Raworth (2017) and John Fullerton (2018).

There is no single definition of regenerative leadership, but seen from an overall perspective, the notion of regenerative leadership draws extensively on eco-systemic ideas, which focus on patterns, connectedness, and relationships instead of separating the world into entities. It attempts to see and understand events and phenomena from a broader perspective in which everything is connected. Regenerative understanding advocates for a transformation of our business models, economic systems, technologies, agriculture, culture, lifestyle, consumption patterns, production methods, leadership, and our ways of organizing. In an organizational context, it is about creating a better balance in the organization's inner life and

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

giving life and nourishment to the larger ecosystem of which the organization is a part. It is not only about improving the work environment and nurturing the wellbeing and inner sustainability of both employees and leaders but also about taking care of the planet and our ecosystems. Put simply, it is about avoiding predation on people, on other living beings, and on the resources of the earth. It is a matter of revitalizing the inner and outer ecosystems by considering and working with the complex relationships among living systems, the environment, nature, the climate, and the economy.

Until now, a large part of the literature on regenerative leadership has been written by consultants and activists, and more academic research in the field is needed. However, this paper should mainly be seen as a contribution to the development of regenerative leadership *in practice* framed by action research.[1]

The action research project
Approach
The pilot project was carried out in collaboration between Aalborg University and Finanssektorens Uddannelsescenter (FU), which is the primary educational center for the financial sector in Denmark. The project was designed within the frame of action research, which is characterized by being process oriented and taking place in procedural learning loops. In these loops, the participants try new actions based on their own wishes and ideas for development and successively change and evaluate the responses from the surroundings in relation to these actions. Action research is based on the idea of creating learning, change, and knowledge *together with* the participants through experience and reflexive process (see also Bradbury 2015; Frimann, Hersted, and Søbye 2019; Shotter 2007, 2010). Rather than trying to mirror and describe the world, action research strives to change the world in a *future-forming* perspective (Gergen 2015).

Generation of data
The empirical material in the project was generated by a group of 12 co-researchers coming from five different banks in collaboration with two process facilitators.[2] The data was collected on a digital platform and consisted of the following:

Is it possible to develop regenerative leadership in
the financial sector through action research?
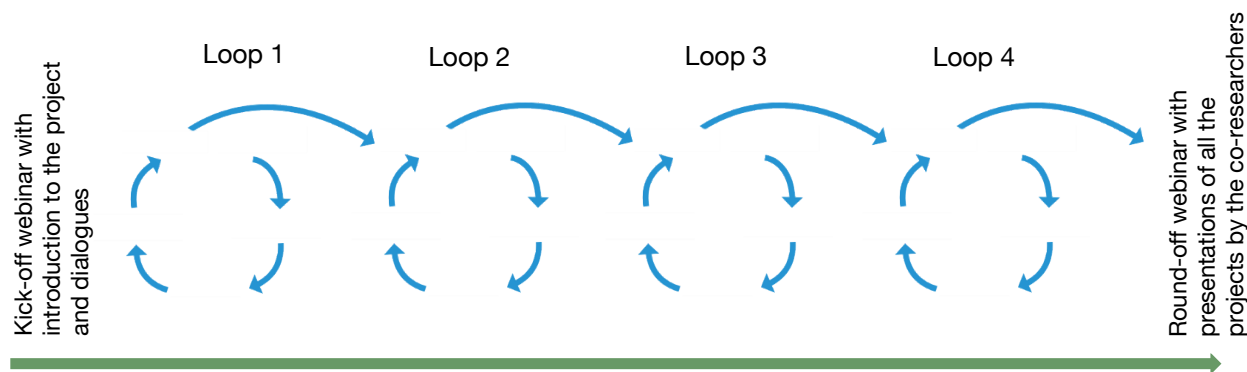Lone Hersted

- Logbooks with reflections on the process (the co-researchers could either upload written logbook notes or video logs where they reflected on their processes)
- Audio recordings of dialogues with reflecting team from four analogue, one-day sessions (approx. 40 dialogues)
- Planks and photos from the four analogue sessions
- Four in-depth individual follow-up interviews online

Process design

The project started with a three-hour webinar that included an introduction to the project, a presentation on regenerative leadership, and an initial exchange among the co-researchers of ideas for regenerative change. They had previously been asked to reflect on three possible wishes for change with which they would like to work based on the following questions at three different levels:

1. At the individual level: How can I as a leader work regeneratively in relation to myself with a focus on inner sustainability?
2. At the departmental level: How can I as a leader inspire and help others to work more regeneratively? How can I support a regenerative awareness and practice in our department?
3. At the level of the organization's relationship to the environment: How can we as an organization work more regeneratively in our relationship with customers, business partners, suppliers, etc. and show ethical responsibility in relation to the surrounding environment, nature, and society in general?

These overall questions formed the DNA structure of the entire project, and during the project, all the co-researchers experimented with regenerative actions in their own leadership practices as inspired by these questions. These three different levels are related to each other, and it may seem artificial to make this distinction. Nevertheless, to scaffold the process and create a clear frame for it, we found it very useful to work with these three levels. The process spanned almost five months from the beginning of September 2023 to the end of January 2024. It is visually illustrated in Figure 1:

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

Figur 1. The overall process design

After the introductory webinar, four analog, one-day sessions were carried out in approximately four-week intervals. Each session had a duration of seven hours and aimed to support initiatives for change in the process based on the following elements:

- Dialogue with a process facilitator and a reflecting team consisting of co-researchers that covered experimental regenerative actions, opportunities, barriers, and responses from the surroundings.
- Evaluating actions and planning new regenerative actions for the coming interim period until the following session.

In the four analogue sessions, we used coaching with the involvement of a reflecting team as a recurring approach (described in depth in Andersen 1991; Hersted and Madsen 2017). These dialogic processes were separately facilitated by the two process facilitators in two smaller groups. The groups varied in composition from time to time to bring different perspectives into play. The involvement of a reflecting team that consisted of the other co-researchers was for the purpose of qualifying and scaffolding each co-researcher's attempts to create change through regenerative actions in their organizations. The four sessions also included a series of joint activities, such as:

- Short power point presentations followed by dialogues on regenerative leadership, sustainability, etc.
- Singing together, meditation, walks, and dialogues in nature.

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

At the final webinar, the co-researchers were offered the opportunity to invite a couple of guests from their organizations, and they presented their projects with regenerative actions, which were then followed by questions and dialogue.

Building a trust-based community of learning
To succeed with the project and sustain the co-researchers in their agency, it was crucial to build a learning environment in which all the co-researchers could feel free to express themselves and relate to each other without experiencing a competitive relationship. Seen in retrospect, I believe we succeeded in this aim. This is probably related to the fact that the co-researchers had volunteered for the project and were highly motivated to participate and that the process design was based on a clear structure for the dialogue processes, with the reflecting team to scaffold the work with regenerative actions. This frame contributed to the experience of the co-researchers being supported by and supportive of each other and the creation of mutual confidence. In these processes, it was fully legitimate to talk about uncertainty and challenges related to the experiments with regenerative practice. In addition, the various activities, including morning singing, meditation, sensory walks, and conversations in nature, contributed to the strengthening of the relationships in the group and a trust-based learning community.

Two brief examples
All the co-researchers worked with regenerative actions at all three levels. One of the co-researchers (co-researcher 1), who was an executive manager of project managers, took initiative for a series of regenerative actions, such as:

Level 1
- Practicing yoga and meditation twice a week

Level 2
- Inviting employees on walk-and-talks in nature, e.g., for the employee development dialogues
- Inviting employees to meditation and mindfulness exercises in the bank every 2nd week
- Inviting employees and colleagues to sing together once a week (he accompanied them by playing the guitar)

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

- Organizing working days with the employees in the forest with dialogues, mindful exercises, strategy work, and cooking in nature (they decided to do this four times a year, following the four seasons)
- Elaboration of a small book on regenerative activities with employees in nature with the aim of inspiring other leaders

As listed in the example, this co-researcher took several initiatives, not only within his team (consisting of project managers) but also at the organizational level while, for instance, inviting the entire organization for morning singing on a weekly basis and by elaborating a little book with the aim of inspiring other managers to practice regenerative leadership and work together with their employees in the forest. In the following transcription, he reflects upon the process in the middle of the project:

Co-researcher 1:

I find that it has been very enriching and developing to be part of the process. And perhaps most of all because the regenerative has been phrased in a recurring way. That's how it has become part of my thinking and consciousness. I think that I have opened my eyes to it in many contexts and probably find it more and more natural to take it as a starting point for my leadership practice in various contexts.

[…] I think that the past few months have made a huge difference. I've done a lot of new things that I haven't tried before, and maybe I've been lucky with the group composition I have in my team. Perhaps, in some way, I myself have been so passionate about it that they have also been quite willing to play along and have been very positive to these somewhat different measures. This gives me hope that when you, as a leader, have an idea and a value that you value highly, that there is also the possibility of passing it on to others and creating some companionship for it. […] Some employees are more in it than others, but I've not come across anyone who is dismissive or speaks against it or rolls their eyes or similar. In other words, they are all prepared to play along with the prerequisites that they each now have.

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

Another co-researcher (co-researcher 2), who was a business development director in another bank, decided to work with development and learning at different organizational levels involving many different activities. At the end of the process, she decided to name it *regenerative capacity building*. Among her activities were:

Levels 1 and 2
- Taking initiatives for stress reduction in the department (e.g., creating spaces for restitution and reflexivity in the working hours)
- Working with more assertive and appreciating ways of communicating
- Developing a value based "leading compass" with her colleagues

Level 3
- Establishing a sustainability council in the bank
- Initiating dialogues with the board about sustainability, regenerative leadership, and social entrepreneurship and the overall role of the bank in society
- Developing a dual materiality analysis
- Developing an ESG report
- Developing a new and more sustainable strategy for the bank
- Building a culture of learning with the active involvement of employees, managers, and the board
- Initiating an educational program on sustainability for all the employees
- Participating in a common CSRD process together with local enterprises

In the following transcription, which is from the final part of the project, co-researcher 2 reflects upon her experience with regenerative capacity building and some of her regenerative initiatives during the pilot project:

Co-researcher 2:
>   *Regenerative leadership is leadership in time, leadership in the present, and better balance in life.*
>   *What matters most to me in the project are the reflecting teams. It has simply been worth its weight in gold to sit and*

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

listen to each other and have things turned around and tell each other about the easy and the difficult stuff and, at the same time, help pushing each other. It has been really rewarding, and I think it has been magical to start new things because I've found the courage to do things I didn't imagine I could or would be successful in doing, so it has been something that you could get a little high from along the way.

The mega-exciting thing that we are starting next week is the work for our new strategy.[…] I have opened my eyes to how to create the right framework and how to give space and recognition to the individual. It provides opportunities at the organizational level. […] Already now I sense a different way of approaching each other and talking to each other.

We've set up a sustainability committee with all relevant subject areas. We meet every quarter and, based on a fixed agenda, take up the current topics that come in regularly. The committee helps ensure anchoring. In terms of education, we have launched initiatives to ensure that during the coming year all employees will go through an educational program to achieve a basic understanding of what sustainability is and why it is important for the bank and our society.

Discussion

I find it striking that co-researcher 1 stated, "[…] it has become part of my thinking and consciousness. I think that I have opened my eyes to it in many contexts and probably find it more and more natural to take it as a starting point for my leadership practice in various contexts." I also find it impressive that he took the initiative to elaborate a small book with activities and exercises that he had developed and tried out with his employees in the forest as a part of the action research project. In addition, he took the initiative to practice morning singing once a week to create a stronger community within the bank. All these initiatives are very unusual in a bank context and require a lot of courage and agency.

In the case of co-researcher 2, it is notable that she uses both the term "regenerative leadership" and the term "sustainability." As process facilitators, we agreed to include the term "sustainability" in the project because it is a term and a theme that has gained increasing attention in the financial sector, whereas the term "regen-

academic
quarter
akademisk kvarter
research from the humanities

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

erative" is a relatively new term. We are aware that the ideology behind the term "regenerative" is more integrative than for the term "sustainable," but we also found it important to recognize and support initiatives for sustainability and encourage co-researchers and their organizations to take more responsibility in relation to the environment and society in general—for instance, through their work with ESG[3] and CSRD[4].

In general, the outcomes of the project have been very positive. Ten out of the 12 participating co-researchers have succeeded in creating significant regenerative changes in their daily leadership practice, for instance, to strengthen the feeling of community and to reduce the stress level in their organizations. Several of the co-researchers have become more reflexive and proactive in relation to psychological, environmental, and social aspects. In addition, two of the co-researchers (both managers at top levels) have initiated work on the incorporation of sustainability and regenerative thinking at a *strategic level*.

However, one of the co-researchers found it difficult to create significant change in the organization due to tensions and power issues in relation to the manager at a higher level, who apparently wasn't ready to support a transformation of the culture and strategy of the bank.

Another co-researcher showed impatience from the very beginning and found that the project wasn't radical enough. This co-researcher was a manager in a cooperative fund that was already following principles rooted in more sustainable ways of thinking. However, she decided to stay and contribute to the project.

What are the learning outcomes from this pilot project? In general, the project has shown that it is possible to not only create change in a more regenerative direction in the financial sector through action research but also that this kind of change process requires time and patience.

We also learned that profound, regenerative, organizational change is very dependent on support from the upper management levels to succeed. However, a majority of the co-researchers have succeeded in creating important regenerative changes in relation to their own inner balance, the working conditions of the employees, and environmental and social sustainability.

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

Seen retrospectively, the work was most intense with regenerative actions at levels 1 and 2, but at the end of the project, the activity on level 3 became more intensive, for example, when some of the managers started to gain influence at a strategic level of the organization, as seen in the case of co-researcher 2. However, not all the participants had the opportunity to do this; it was mainly those who held influential positions in the top management.

Many of the theories of regenerative leadership are very abstract and can be difficult to implement in practice. With the use of action research as a scaffolding approach and by working at the three levels (individual, group, and organizational), it became possible for the co-researchers to work with regenerative leadership in a more concrete way. This was probably because it was the co-researchers themselves who formulated their own development wishes and ideas for regenerative actions based on the concrete needs they experienced in their own organizational context. The co-researchers obtained positive feedback from their employees and colleagues, which led to small adjustments and gave them the courage to initiate new actions, and gradually, these regenerative initiatives spread like rings in the water.

During the project, challenges also appeared, including:

- If there was not enough time to work with the regenerative actions in daily practice
- If there was no support from the top management level
- If the bank was exclusively focused on the financial bottom line
- If the organizational culture, norms, and values pointed in a completely different direction

It takes courage to introduce new habits and new forms of practice in a trimmed performance culture. As a process facilitator, I observed that all the co-researchers showed great courage to question habitual organizational thinking and taken-for-granted assumptions, even if this often meant a showdown with dominant norms and customs in the organizational culture.

In its basic essence, the regenerative paradigm lays the groundwork for transformation in all the ways we think, live, work, produce, and consume. Giles Hutchins (2022) wrote about the metamorphosis that the individual must go through to experience

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

development on a deeper level of consciousness. Metamorphosis requires a transformative learning journey. However, a leader or an employee cannot undertake this transition alone but needs to be surrounded by colleagues, fellows, and organizational members who support this transition and are ready to go through this journey themselves.

In the project, we emphasized the creation of a learning space characterized by trust, confidence, and openness. All the co-researchers (coming from six different organizations) contributed to the construction of a nurturing learning space. In this space, the leaders not only expressed their successes but also their challenges, uncertainty, and fragility. The division of the group into two smaller groups to carry out coaching dialogues and involve the reflecting team contributed to the creation of a safe and nurturing atmosphere. In combination with morning singing, sensory walks, meditation, and conversations in nature, this has contributed to creating a strengthened connectedness in the group and led to the building of a trust-based community of learning. However, the project has shown that organizational support and backup is a crucial factor to sustain and scaffold a transition toward a more profound regenerative development at an organizational level.

The project has contributed to a series of initiatives that have helped to strengthen the wellbeing of managers and employees and to create a more well-balanced work life, which is an important, but not easy, achievement in a sector characterized by high performance requirements and a high work pace. In several cases, it has also contributed to the creation of an improved work environment at the organizational level.

It is more difficult to discern the extent to which participation in the project has contributed to *transformative* learning among the managers, whereby they have radically revised their basic assumptions and managed to push the organization's strategic work in a more sustainable and socially responsible direction in the long run. In some cases (for instance, as seen in the case of researcher 2), there are several examples of the co-researchers explicitly expressing that important steps have been taken on a strategic and organizational level in a more regenerative and sustainable direction. As a researcher, I still follow the leaders on the sidelines and have observed that several of them continue to work with their regenera-

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

tive actions and have put in motion new regenerative initiatives in their organizations.

The pilot project had a duration of almost five months and relied on two virtual and four analogue meetings with the group. This is a relatively short time seen from a larger development perspective. The ideal would have been a longer process in which we could have worked more intensively with deeper insights and more comprehensive initiatives for organizational and societal change. However, this requires that the top management and the organization's board become actively involved and achieve a more thorough understanding of what it means to think, work, and act regeneratively as an organization.

Conclusion

Based on the project, I conclude that there is not only great potential but also a great need for regenerative leadership in the financial sector. This is not only in relation to environmental sustainability but also in relation to the prevention of stress and burnout.

Data in the present pilot project show that the co-researchers managed to create significant changes at levels 1 and 2. It was more difficult for them to achieve comprehensive results on level 3. The managers who were placed at the top level of the organizational hierarchy and were thus closest to the board had better opportunities to influence the bank's strategy than did a manager at a lower level. A more thorough transformation at level 3 would require a longer time, a higher degree of commitment from top management, and a fundamental confrontation with a one-sided, dominant growth logic. A more comprehensive development of regenerative leadership would also require a more thorough transition of our economic system in general as well as changes in how business models are designed and managed in practice. However, in the project, important initiatives can be observed at level 3, for example, in the work with regenerative theme days, the establishment of working groups, the elaboration of CO_2 reports, and in the work with ESG, CSRD, and the training of employees in sustainable customer dialogues.

In general, the pilot project has shown that it is not only possible to create change and transformation toward a more regenerative direction in the financial sector through action research but also that

Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

a transition at a deeper and more comprehensive level requires more time than five months along with stronger commitment and support from the top level of the organization.

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Lone Hersted

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Is it possible to develop regenerative leadership in
the financial sector through action research?
Lone Hersted

Notes

1 I am aware that there is a gap here and that there is a need to develop more research on regenerative leadership. However, the scope of this journal article does not allow a comprehensive unfolding of the theory of regenerative leadership; rather, I expect to unfold this in depth in a forthcoming publication.

2 Only one of the co-researchers did not work in a bank but in human resources at The Educational Center of the Financial Sector (FU). One of the two process facilitators in the project, Lars Munch Svendsen, works as head of department at FU, and the other facilitator, the author of this article, works as a researcher at Aalborg University.

3 ESG stands for Environment, Social and Governance, and covers respectively environment and climate, social conditions and business behavior. ESG is a way of working with sustainability, which is becoming more and more widespread in both Danish and foreign companies.

4 CSRD stands for The Corporate Sustainability Reporting Directive which is a directive from the EU that sets requirements for companies' sustainability reporting.

An operationalization of Teal

A catalyst for creating public welfare in a complex society?

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Abstract

The public sector must reinvent itself as modern complexities require governance and management styles, enabling more agile and network-based collaboration. The Teal paradigm (Laloux 2014) has proven how *self-management* (coordinated local autonomy), *evolutionary purpose* (a sense of meaning*),* and *wholeness* (trust enabling being present as a 'whole' human being) can foster innovation, agility, and effectiveness in the private sector. This raises an intriguing question: Can the Teal paradigm be operationalized, describing Teal-public governance and leadership and thereby supporting the public sector's efforts to produce welfare in a complex society? First, the article makes a theoretical contribution by operationalizing the three Teal characteristics into 12 variable specifications. Subsequently, examples from a trust experiment in a Danish municipality illustrate how Teal-operationalization can facilitate the development of a teal praxis. Finally, the pertinences of the operationalizations for research and praxis are discussed.

Keywords: Teal, selvorganisering, formålsdrevet frisættelse, tillid, afbureaukratisering.

Indledning

Med sin beskrivelse af Teal-organisationer har Laloux (2014) åbnet dørene for et nyt landskab – et nyt paradigme med tre kendetegn. Han har vist, hvordan organisationer ikke behøver begrænses af et kapitalistisk fokus på konkurrence og profit for at være velfungerende. De kan i stedet drives af et evolutionært formål, som er meningsfuldt for den enkelte og forbinder alle på tværs af organisationen. Han har vist, hvordan rationelle, hierarkiske styringslogikker, der skaber fragmenterede enheder, som utilsigtet modarbejder hinanden – kan omformes og gøre ansatte[1] i stand til at organisere sig dynamisk alt efter, hvad de omgivende forhold kalder på. Og endelig har Laloux vist, at når de ansatte møder ind som mere 'hele' mennesker, hvor både faglighed, personlig viden, styrker og sårbarhed bydes velkommen, så forbedres livet i organisationen og organisations evne til at indfri sit formål.

Og netop de karakteristika gør Teal-tænkningen interessant i en tid, hvor mange offentlige organisationer er i knæ efter flere årtier med bureaukratisk styring (Bentzen 2020; Bozeman 2020; Herd and Moynihan 2018) og New Public Management (NPM) (Møller et. al. 2016)

Bureaukratisk styring har skabt et lille decentralt råderum (Andersen et al. 2020), hvor ansatte ikke kan bruge deres faglighed til at lave lokalt tilpassede løsninger, fordi regler og instruktioner skal sikre forudsigelighed, præcision, upartiskhed og retfærdighed (Weber 1968). Men derved bliver organisationen ufleksibel overfor uforudsete forhold, hvilket er omkostningsfuldt i en foranderlig verden (Hamel and Zanini 2020).

Oven i dette har NPMs fokus på konkurrence og resultatmål forstyrret fokus på det overordnede formål og prioritering af langsigtede forbedringer (Boyne 2003; Boyne et al. 2005; de Bruijn et al. 2008) og har på nogle områder ført til dyrere og dårligere velfærdsydelser (Hood and Dixon 2015), hvilket skaber meningstab for de ansatte.

Dette kan forklare, at en bred interesse i at afbureaukratisere, vise tillid og frisætte i den offentlige sektor trænger sig på (Vallentin and Thygesen 2017; Regeringsgrundlag 2022; Bringselius 2023; Hjelmar and Jakobsen 2021)

Her kommer Teal ind i billedet som et bud på en vej mod en ønsket fremtid. Dog maler Laloux med den helt store pensel, når han beskriver sin Teal-tænkning ud fra tre kendetegn. Han intro-

ducerer Teal som et nyt menneskesyn, og et nyt paradigme, der bygger videre på og gør op med de tidligere paradigmer, der har præget organisationslivet i vesten fra menneskets tidligste udviklingsstadie (2014:28). Det rationalistiske, mekaniske menneskesyn (Capra and Luisi 2014) skiftes ud med et humanistisk, tillidsbaseret menneskesyn.

Fordelen ved den store pensel er, at Teal-tænkningen er så bred, er at den kan inspirere på tværs af landegrænser, sektorer og interesser. Der er ikke én stringent teal-metode, man skal implementere. Ulempen er, at oversættelsen til en dansk offentlig kontekst kan blive for vilkårlig, hvis det er op til den enkelte at vurdere, om man arbejder Teal-baseret og skaber værdi for borgerne.

Teal-teori har mange ligheder med humanistiske teorier om frisættende ledelse (Dall, Bohni, and Iversen 2011) situationsbestemt ledelse (Hersey and Blanchard 1969), transformations ledelse (Bass, 1985), autentisk ledelse (Avolio and Gardner 2005), regenerativ ledelse (Storm and Hutchins 2019), systemteorisk ledelse (Capra and Luisi 2014) og med teorier om motivation (McGregor 1960; Ryan and Deci 2000), emotionel intelligens (Goleman 1995) tillid (Dirks and Ferrin 2002; Edmondson 1999), innovative nonhierakiske organistionsformer (Mintzberg 1985, 2009) og distribueret autonomi (Denis, Lamothe, and Langley 2001). Fællestrækkene kan gøre det svært at se forskellen i praksis, selvom Teal adskiller sig fra de øvrige humanistiske teorier ved både at forholde sig til kultur, ledelse og styring.

Formålet med denne artikel er derfor at udforme konkrete Teal-kriterier i form af 12 operationaliseringer, som kan bruges i arbejdet med at transformere offentlige organisationer i tilpasningen til en volatil og kompleks verden. Det fører til følgende forskningsspørgsmål:

Hvordan kan de tre kendetegn operationaliseres til offentlige Teal-organisationer og derved bidrage til udviklingen af en Teal-praksis?

Det er en fordel med forudgående kendskab til Teal, da artiklens mål er at illustrere anvendeligheden i en offentlig kontekst. Teorien præsenteres og omsættes til 12 operationaliseringer af Teal-kriterier. Herefter gives der eksempler på, hvordan Teal-operationalise-

ringerne kan bruges i forskning og som guidelines i praksis. Eksemplerne kommer fra en offentlig case, hvor en forvaltning arbejdede med at frisætte og øge tilliden. Sidst diskuteres anvendeligheden af operationaliseringerne.

En operationalisering af Teal til en offentlig kontekst

Definitionen af Teal-organisationer bygger på Laloux's forskning i 12 organisationer, der er drevet ud fra radikalt anderledes præmisser end klassisk styringsstænkning. I Lalouxs induktive udviklede teal-teori tjener disse 12 organisationer som cases, der tilsammen danner grundlaget for udformningen af Laloux's 3 kendetegn for Teal-organisationer: De arbejder med *evolutionære formål*, *selvledelse*, og karakteriseres ved *helhedstænkning*. Men Laloux's Teal-teori rummer to udfordringer ift. at anvende den i en offentlig kontekst, både i forskningsøjemed og til udviklingen af en Teal-praksis:

1. Laloux konkretiserer, hvordan Teal ser ud i praksis (2014, 412-416), men anvisningerne rummer for stor diversitet. Dels er nogle af dem langt fra dansk lovgivning, fx "*Alle kan bruge et hvilket som helst beløb, under forudsætning af at rådføringsprocessen bliver respekteret*" (2014, 416). Dels er nogle så specifikke, at de risikerer ikke at være relevante, fx "*Stillerum*" (2014, 415). Hvis man som forsker skal kode empiri fra forskellige organisationer, for at analysere deres arbejde med at udvikle Teal, kan man betvivle vigtigheden af at alle organisationer skal have et 'stillerum'. Der er således brug for operationaliseringer, der er i overensstemmelse med Teal-teori, og samtidig er relevante og anvendelige i den offentlige sektor.

2. Lalouxs intention om at udviklingen af en Teal-praksis skal ske lokalt, uden foruddefinerede generiske metoder og guidelines, indebærer en stor lokal tilpasningsmulighed. Fx er der ingen faste resultatmål, "*strategien fremkommer naturligt som et resultat af de selvledende medarbejderes intelligens*" (2014:415), ligesom koordinering og møder planlægges "*ad hoc, når behovet opstår*" (2014:412). Denne Bottom-up baserede emergerende tilgang til organisationsudvikling kan gøre det sværere at vurdere, hvornår man i praksis arbejder Teal-baseret. Hvordan undgår man fx at manglende koordineringsevne sminkes med argumentet om, at man ikke vurderer, at der er 'behov' for koordinering?

I en offentlig sektor, hvor frisættelsen skal være inden for en politisk ramme, er der derfor brug for konkrete operationaliseringer,

som alle kan bruges til at evaluere og vurdere, hvorvidt man lykkes med at arbejde Teal-baseret og efterlever de politiske mål. Derfor vælges en instrumentel tilgang, hvor Teal operationaliseres til en offentlig kontekst. Tanken er, at denne deduktive metode kan føre til operationaliseringer, der kan anvendes i forskningsregi og samtidig tilbyde en retning for - og pejlemærker for succes i arbejdet med Teal i praksis.

De tre Teal-kendetegn omsat til 12 operationaliseringer
1. Det evolutionære formål

Det evolutionære formål kan sammenlignes med en mission, men adskiller sig ved at være et organisatorisk formål, der kan bevæge sig som følge af forandringer i omgivelserne eller ny indsigt blandt de ansatte. Det evolutionære formål skal opleves meningsfuld for alle og fungere som en samlende ledestjerne, hvor alle oplever, at deres arbejde udgør et vigtigt bidrag.

I den offentlige sektor, hvor alle arbejder for at skabe velfærd ad forskellige veje, kan det være nemt at få øje på det fælles meningsfulde formål - fx. arbejder sygehusdirektøren og portøren begge for at fremme borgernes sundhed. Alligevel adskiller arbejdet med et evolutionært formål sig fra praksis i mange offentlige organisationer. Dels fordi opdelingen i hierarkier og enheder med hver deres lokale budgetter har skabt en silotænkning, hvor enheder i samme organisation, i bestræbelser på at holde eget budget, kommer til at blive modparter i arbejdet omkring borgerne. Og dels fordi der også kan opstå et modsætningsforhold mellem medarbejdere og ledere fx i besparelsesprocesser eller udformning af vagtplaner. Med det evolutionære formål som ledestjerne samarbejder alle ansatte om, hvordan opgaven kan løses bedst muligt ud fra alle givne kompetencer, der er til stede i organisationen, og i kraft af et tværfagligt samarbejde på tværs af afdelinger og budgetter. Det evolutionære formål omtales herefter som formålet.

Formålet
1 Formålet er kendt af alle og guider alle beslutninger, der træffes af medarbejdere og ledere.
2 Medarbejdere og ledere ser efter de samme tegn på om organisationen lykkes med at indfri sit formål.

3 Ansatte oplever, at det arbejde, de udfører, er vigtigt for at deres organisation kan indfri sit formål.
4 I organisationen udnyttes den viden, de kvaliteter og kompetencer, der er til rådighed optimalt ift. at indfri formålet.

2. Selvorganisering.

Selvorganisering har fået stor opmærksomhed i introduktionen af Teal, fordi Laloux introducerer en radikal ny måde at tænke selvledelse, frisættelse og medbestemmelse på. Selvorganisering skal ikke forveksles med den selvledelse, hvor medarbejderen får autonomi til at lede sig selv (Kürstein 2014) eller den frisættelse, hvor ledere inddrager ansatte uden at lave strukturer, der distribuerer magt ud lokalt (Dall et al. 2011). Selvorganisering foregår ikke kun i relationer, dialoger og gennem adfærd, men understøttes af styring i form af strukturer, som beslutningstagere bruger for at opnå deres målsætninger (Andersen and Pedersen 2014), fx procedure, regler, budgetter og organisationsdiagrammer. Selvorganisering understøttes af strukturer, der fordeler magt og indflydelse til alle relevante parter i organisationen med den hensigt at lykkes bedre med at indfri formålet. Således faciliterer selvorganiseringen tværgående og vertikal koordinering (budgettering, ressourceallokering, konflikthåndtering, medarbejderudvikling osv.), der gør at større organisationer kan arbejde netværksbaseret, samtidig med at de har et formelt hierarki som skellet (Thybring 2022). Distributionen af magt og ansvar kræver et stort fokus på, hvilke beslutningsprocesser, der kan og skal bruges hvornår. En af styrkerne ved selvorganisering er, at man undgår pendulsvingningerne. I det offentlige er der en tendens til at tænke, at modsvaret på hierarkisk topstyring er Bottom-up. Men den rent medarbejderdrevne Bottom-up-organisation har flere svagheder: Som modreaktion på meningsløs kontrol, fjernes relevant kontrol, som barnet, der skylles ud med badevandet. Samtidig bliver organisationen let ukoordineret, fordi ingen bestemmer over hinanden, og kvaliteten og effektiviteten forringes i lange konsensus-beslutningsprocesser (Aagaard 2024). I den sammenhæng er formålet ofte tabt af syne.

Selvorganisering er derfor ikke et udtryk for, at der ikke er styring. Men styringen er udviklet så strukturerne myndiggør og støtter medarbejderne, giver dem råderum og mulighd for at bruge deres faglige dømmekraft. Styringen fungerer overvejende som en

rammestyring, der skaber rammer for samarbejde og samskabelse (Ansell and Torfing 2021), der tjener formålet.

Selvorganisering (Struktur, organisering og regler)
5 Magt bruges til at sørge for, at alle arbejder for formålet.
6 Struktur understøtter åbenhed og videndeling.
7 Monitorering, dokumentation og data bruges til at informere beslutninger og fører til relevante justeringer.
8 Strukturer bruges til at bemyndige medarbejdere og understøtte muligheden for decentrale lokalt tilpassede beslutninger.

3. Helhedstænkning.

Helhedstænkning indebærer at skabe plads til at mennesker kan møde ind på arbejde som hele mennesker i et miljø kendetegnet ved exceptionel høj grad af tillid, så ansatte tør dele succeser, fejl og tvivl med hinanden, og bruge hele deres repertoire af viden, erfaringer, sansninger og intuition. Det indebærer både at turde bringe professionelle og personlige kvaliteter i spil, så det forbedrer arbejdet (Hamel and Zanini 2020) og øger arbejdsglæden. Den høje grad af tillid er også beskrevet af andre forskere som "psykologisk tryghed" (Granhof Juhl and Sørensen 2024; Edmondson 1999) og "relationel tillid" (Bentzen 2019, 2022; Mose, upubliceret artikel), der dækker en kultur, hvor viden og uvidenhed kan deles, fordi alle samarbejder om at lykkes bedst muligt sammen og derfor ikke er bange for at gøre sig sårbare. Den relationelle tillid opbygges ikke kun i relationer, men også i kraft af strukturer (Bentzen 2019, 2022; Hoy and Sweetland 2001; Mose, upubliceret artikel), der er tillidsfremmende. Det kan fx være procedure, der skaber åbenhed om beslutninger og styrker udviklingen af en god feedback kultur.

Helhedstænkningen bygger på et tillidsfuldt menneskesyn (McGregor 2006; Schillemans 2008), hvor medarbejdere forventes at være motiverede til at bidrage til det fælles formål. Man tror på, at mennesker, der er indre motiverede, løser arbejdet bedre (Ryan and Deci 2000). Ledelsesopgaven handler derfor ikke om at indarbejde kontrolsystemer, der forhindrer potentiel selv-opportunisme og motivere med konkurrence, men om hvordan man skaber et klima, der understøtter de ansatte i at udvikle sig (Kegan and Lahey 2016). Intentionen er at alle ansatte evner og har mod til selv at tage kritisk

stilling til, hvordan de qua deres faglighed bedst muligt omsætter de politiske ønsker, til størst gavn for borgerne.

Helhedstænkning (en tillidsfuld kultur, der gør det muligt at møde op, som et helt menneske):

9   Samarbejdskulturen er kendetegnet ved nysgerrighed, åbenhed, refleksion, fælles læring og brug af professionel dømmekraft.
10 Håndtering af problemer, fejl, konflikter og succeser fører til læring.
11 Der er en oplevelse af gensidig tillid, man er 'på samme hold' vertikalt og horisontalt, frem for at være modparter.
12 Ansatte ser sig selv og kollegaer som kompetente og ansvarlige voksne, med både styrker og svagheder.

De 12 operationaliseringerne lapper over - og betinger hinanden. Fx kan operationaliseringen "*I organisationen udnyttes den viden, de kvaliteter og kompetencer, der er til rådighed optimalt ift. at indfri formålet.*" kun lade sig gøre, hvis "*formålet samtidig er kendt*", og hvis der er tillid til at kunne "*dele viden og uvidenhed*". Dét, at operationaliseringerne hænger sammen, understreger den holistiske forståelse af organisationer, som ligger til grund for Teal-tænkningen.

Eksemplificering af hvordan teal-operationaliseringerne kan bruges

I det følgende illustreres det, hvordan teal-operationaliseringerne forventeligt kan bruges i forskning og i udviklingen af en Teal-praksis. Det gøres med eksempler fra en case i en dansk kommune, hvor man fra politisk niveau iværksatte et 3-årigt tillids- og frihedsforsøg på hele skoleområdet, der fik store frihedsgrader. Forsøget byggede "*på en tro på, at vi får velfærd af højere kvalitet med lokale løsninger tæt på borgerne*". (Aftale om velfærdsaftaler, 2020, 1). Det fremgår, at det er afgørende "*at mest mulig frihed gives til de enkelte skoler, herunder skoleledelsen og det undervisende personale.*" (Ibid. 2020, 2). På den baggrund vurderes casen at være brugbar som et eksempel på en organisation, der har ambitionen om at frisætte for at indfri formålet (skabe velfærd). Data fra casen er indsamlet af undertegnede fra 2021-2024, gennem 62 interviews og 36 observationer af praksis og møder, på alle niveauer fra lokalpolitikere til medarbejdere. Interviewtransskriptioner og observationsnoter er analyseret ud fra de

12 operationaliseringer for at undersøge, om alle operationaliseringer kan bruges til at analysere og forstå det, der sker i praksis, - både når aktørerne lykkes godt eller oplever udfordringer med udviklingen af en frisættende og tillidsbaseret praksis. Analysen viste at alle 12 operationaliseringer er anvendelige som analyseværktøj. Samtidig vurderes de også at kunne bruges som dialogværktøj af praktikere. Af hensyn til pladsen er det ikke muligt at illustrere anvendeligheden af alle 12 operationaliseringer, i stedet gives 4 eksempler. 2 hvor praksis flugter med operationaliseringerne og to, hvor det modsatte var tilfældet.

Eksempel på #1. Formålet er kendt af alle og guider alle beslutninger, der træffes af medarbejdere og ledere.
I det analyserede materiale er der mange eksempler på, at operationalisering #1 er i spil – både hvor formålet er kendt af alle og guider alle beslutninger og eksempler på det modsatte. Det følgende er et citat fra skolechefen, der beskriver, hvordan de greb forsøget an, og lavede en rammeaftale mellem det politiske niveau og hver enkelt skole, der skulle have lov til at udvikle sin egen praksis.

> Skolechef: "Vi lavede det sådan, at skolerne skulle beskrive, hvordan de vil leve op til folkeskolens formål. (…) Derefter skulle de gå i dialog med vores udvalg. Ud fra det blev der lavet en fælles samarbejdsaftale, som skolerne arbejder udefra. Skolerne kan til hvert en tid komme og sige: "Vi har brug for at lave aftalen om". Fordi vi tænker, at undervejs sker der ting, som kan skabe et behov for at genbesøge samarbejdsaftalen."

Når skolerne bliver bedt om at fortælle, hvordan de vil arbejde, så de lever op til folkeskolens formål, og hvilken en samarbejdsaftale, de ønsker med lokalpolitikerne, kan de ses som en struktur, der giver plads til selvorganisering samtidig med at formålet er kendt og guider beslutningerne.

Eksempel på #2 Medarbejdere og ledere ser efter de samme tegn på om organisationen lykkes med at indfri sit formål.
På tværs af alle skoler er der eksempler på, hvordan ansatte oplever, at undervisningen er blevet bedre for eleverne, fx i kraft af bed-

re skoleskemaer, hvilket løfter kvaliteten af undervisning. Men i et af interviewene fortæller en lærer om tegn på, at de lykkedes godt og fremhæver, at hans eget skema er blevet bedre. Dvs. at han har fået bedre arbejdsvilkår. Selvom arbejdsvilkår er betydningsfulde, så viser eksemplet, hvordan de ansatte kigger efter lidt forskellige 'tegn på om organisationen lykkes'. Nogle fokuserer på elevernes skemaer, andre mere på egne skemaer. Med teal-operationaliseringen tydeliggøres det, at det vigtigt at forholde sig til dette som organisation, da man ikke kan arbejde Teal-baseret på en værdiskabende måde, så længe hver mand definerer egne succeskriterier.

Eksempel på #8 Strukturer bruges til at bemyndige medarbejdere og understøtte muligheden for decentrale lokalt tilpassede beslutninger.
I casen er der utallige eksempler på, at strukturer har understøttet muligheden for lokalt tilpassede løsninger. I forsøget er der 25 skoler og ikke 2 af dem har gjort det samme. På den måde er det i sig selv et udtryk for decentral tilpassede beslutninger. I det følgende beskriver et lærerteam, hvordan undervisningen både foregår på skolen og på naturgrunden, som et tilbud skolen selv har udviklet.

> "Vi vægter at have Naturgrunden og at give de elever, der har brug for den frihed derude, muligheden for at komme derud. Nogle elever har brug for et samarbejde med Hans [lærer som har skabt Naturgrunden]. (…) Vi har fortalt vores ledelse, at der skal lægges timer og fokus på at komme derud, fordi det gavner nogle af vores unger og de lærer på en anden måde. Det gør, at vi rummer virkelig mange børn i udsatte positioner."

Eksemplet viser, hvordan strukturerne i form af store frihedsgrader ift. hvor og hvordan undervisningen afvikles, bemyndiger medarbejdere til at tilrettelægge undervisningen så den er bedst for eleverne.

Eksempel på #11 Der er en oplevelse af at være "på samme hold" vertikalt og horisontalt, frem for modparter.
Denne operationalisering har været interessant at analysere data ud fra, fordi der er flere situationer, hvor ledere og medarbejdere på en og samme tid ser sig selv som værende på samme hold (hvor de

samarbejder om at lave gode skoler), men alligevel handler de også som om, de er på hver deres hold. I casen var der fx en situation, hvor en leder fra forvaltningen med strakt arm og pegefingeren rettet mod et lederteam, sagde til dem: "*Nu er I frisat, men så er det også jeres ansvar*". Flere af lederne fortalte bagefter, at de oplevede det som en trussel, idet deres leder fralagde sig ansvaret, i stedet for at støtte dem. Derved mistede de lidt modet til at afprøve nye ideer, af frygt for at bliver hængt ud, hvis noget gik galt. På den måde, oplevede de meget lille 'hold-følelse' med deres ledelse. Ingen af lederne talte med lederen i forvaltningen om denne episode, hvilket vidner om en samarbejdskultur, der ikke er kendetegnet ved *'åbenhed'* og *'refleksion'* i alle led.

Diskussion og konklusion

Artiklens præmis er, at Teal-tænkningen tilbyder et sammenhængende svar på, hvordan man kan frisætte i det offentlige, så det fremmer velfærden, men at der er brug for Teal-operationaliseringer. Dels for at styrke validiteten i forskning i Teal, og dels i praksis for at kunne vurdere om arbejdet med Teal er på rette vej og inden for de politiske rammer.

Som analyseværktøj virker operationaliseringerne godt. Når man koder data med dem, får man øje på interessante tendenser fx hyppige tematikker. Yderligere forskning er oplagt, for at undersøge, om der er brug for justering af operationaliseringerne og om de er anvendelige på tværs forskellige offentlige sektorer og professioner.

I praksis tilbyder operationaliseringerne en klarhed: Noget er mere Teal end andet. Det er fx Teal at håndtere fejl, på en måde, hvor det bliver trygt at tale højt om tvivl og problemer en anden gang, og det er ikke Teal at tabe formålet af syne. Den klarhed er en fordel, fordi det er nemmere at spille sammen på en bane, hvor alle kender spillets regler.

En ulempe ved operationaliseringerne er, at Teal-tænkningen kan blive instrumentel og teoretisk, så ansatte bliver mere optaget af at kigge på operationaliseringerne og *tale* om forbedringer end af at *praktisere* dem. I casen var der mange eksempler på, at ansatte lykkedes uden at have haft Teal-operationaliseringerne at arbejde ud fra. Hvilket viser, at det ikke er en forudsætning at have dem ved hånden for at udvikle Teal.

Laloux beskriver det som en "*nødvendig forudsætning*" (2014:343) for at udvikle Teal, at både direktør og bestyrelse støtter idéen. Man kan derfor argumentere for, at Teal, uanset operationaliseringerne, er vanskeligt at praktisere i et demokrati, hvor man refererer til to folkevalgte bestyrelser (regeringen, regionsråd og byråd), der tilmed udskiftes hvert 4. år. Men der findes allerede en række eksempler på offentlige og private organisationer, der er lykkedes med at udvikle en Teal-praksis, hvor udviklingen startede lokalt i en afdeling og udviklede sig derfra (Jensen and Hvid 2024). I lignede cases, hvor man længere nede i hierarkiet vurderer, at kvaliteten i velfærden kan forbedres ved at udvikle en Teal-praksis, kan operationaliseringerne måske bruges til at forelægge direktion og politikere og konkretisere, hvad det er for en udvikling, man ønsker tilslutning til.

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Note

1 Ansatte dækker over både ledere og medarbejdere, da en af pointerne i Teal-tænkning er at der er flere ligheder end forskelle på ledere og medarbejdere. Fx er ledelse noget begge funktioner bedriver

What are the potentials of interorganizational collaborative management research in mobilizing leadership agency?

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Abstract

Interorganizational collaborative management research (ICMR) offers new insight into action research, reflexivity, and collaboration in research practice. The article develops the research area especially in terms of uniting managers from different organizations with researchers, and outlines how ICMR creates a psychologically safe learning and development space.

Our study introduces an interorganizational learning and development space, where managers from diverse organizations collaborate to develop their leadership capabilities and perform actions in their own organizational systems, supported by a systematic research design collecting qualitative data. We provide a description of ICMR as a research approach, outline our methodology for ICMR and illustrate the outcomes of an ICMR project, discussing learning mechanisms, strengths, challenges, and opportunities for future development in the field.

Keywords: interorganizational collaborative management research, action research, leadership agency, leadership development, learning space

What are the potentials of interorganizational collaborative
management research in mobilizing leadership agency?
Jan Rohwedder
Søren Frimann

Introduction

Contemporary organizational contexts face multifaceted problems, and changes in organizations are continuously happening at an accelerated pace (Millar et al. 2018). These problems often tend to be "wicked" problems (Churchman 1967; Rittel and Webber 1973; Turnbull and Hoppe 2019; Grint and Jones 2022), for which there are no clear and simple solutions. In such a context, traditional management approaches are often insufficient. We argue that it is crucial for managers to collaborate on learning to navigate these challenges effectively (Watkins and Marsick 2019). Managers must deal with wicked problems in a more collaborative, inquiring, and critically reflexive manner to find new, creative, and possible ways to respond and act adequately to multifaceted challenges in their daily practice. This is best achieved through interaction with peers in a learning space characterized by critical reflexivity (Cunliffe 2004) and psychological safety (Edmondson 2023).

However, many managers lack such a collaborative learning space and are often left alone to deal with complex issues, decisions, and actions. Furthermore, sharing experiences and speaking freely with colleagues about (personal and managerial) challenges pose a risk and can be difficult for managers due to formal power relations and positioning in the organization. Simultaneously, managers from the same organization often tend to reinforce the thinking that is prevalent in the organization. Often, they could benefit from getting new ideas, challenges, and perspectives from outsiders, e.g., managers from other organizations, researchers, or consultants. We will argue that a psychologically safe dialogic learning space can be advantageously placed outside the manager's own organization. To create development and achieve an effective outcome, access to such a learning space must be facilitated, e.g., by researchers or consultants, and be linked to experimentation with new actions in the manager's own organizational practice.

In this article, which is based on a research project, we will explore the importance of creating a collaborative learning space between researchers and managers from different organizations.

The project investigates/examines the following research question: *What are the potentials of interorganizational collaborative management research (ICMR) in mobilizing leadership agency?*

What are the potentials of interorganizational collaborative
management research in mobilizing leadership agency?
Jan Rohwedder
Søren Frimann

Leadership agency can be mobilized and supported in many ways, e.g., practicing, sparring, trusting relationships, goalsetting, social support, role models and a collaborative environment (Frost 2006; Eteläpelto et al. 2013; Goller and Harteis 2017; Bandura 2018; Chen-Levi et al. 2022). Many of the mobilizing elements are also mentioned in the ICMR literature as possible ways to follow in the practical implementation of an ICMR study, and therefore it is assumed that participation in an ICMR project will support the mobilization of leadership agency.

In contrast to many collaborative management research (CMR) projects, collaborative inquiry in this project is established in a dialogic and critically reflexive learning space consisting of researchers and managers from *different organizations*; therefore, we call this space *interorganizational collaborative management research* (ICMR).

Only sparse research has been made into the field of ICMR. We need more empirical-based research and knowledge on what a dialogic and critical reflexive learning space made up of managers and researchers from different organizations can provide in terms of benefits, challenges, and impact.

One possible objection to / criticism of our research could be that. leadership development based on action learning (AL) shares similarities with ICMR when an AL group is established across different organizations. However, action learning does not include research, as its primary purpose is to create learning and development (Volz-Peacock et al. 2016). ICMR is based on both research and development through the same process. In this article we will present our research and findings in relation to a project on ICMR in Denmark consisting of a group of five managers from large private and public organizations and two researchers. Finally, we will discuss strengths, challenges, and opportunities for future development in the field. In the next section, we will present and define collaborative management research and briefly present inspiration from research in interorganizational groups.

Collaborative management research

Collaborative management research (CMR) is an approach that aims to create change in organizations while simultaneously studying the change process to generate new knowledge. CMR rests on the assumption that organizations are learning systems, and chang-

What are the potentials of interorganizational collaborative
management research in mobilizing leadership agency?
Jan Rohwedder
Søren Frimann

es within these systems require active participation and collaboration from their members (Lewin 1946; Shani 2023).

Thus, CMR can be seen as part of the collaborative inquiry family, which includes for example action research, participatory action research, action learning, collaborative research, and CMR (Coghlan 2023). These forms of collaborative inquiry and CMR align with mode 2 research (Gibbons 1994; Gibbons et al. 2011), which covers applied research in specific contexts addressing real-life issues in practice.

As a research methodology, CMR is distinguished by its application within specific organizational contexts where tangible managerial actions are necessary. The essence of this approach lies in the formation of a community of inquiry (COI), whose key elements are a problematic situation, scientific attitude, and participatory democracy (Shields 2003; Coghlan and Shani 2008). In the COI, internal organizational leaders and external researchers jointly investigate questions of shared interest. The investigation often employs transdisciplinary, multiple scientific methods, and various learning mechanisms are designed to create a learning space. Learning mechanisms are formal processes, methods, spaces, structures etc., created to support development of performance and learning. The underlying assumption is that the capability to learn arises from the design of specific learning mechanisms that fit the purpose of the CMR project. Overall, the purpose of establishing a learning space is to improve performance in the organizations and to generate new academic knowledge (Canterino et al. 2016; Cirella et al. 2016; Coghlan et al. 2016; Shani 2023).

This study uses Pasmore et al.'s definition and understanding of CMR:

> Collaborative management research is an effort by two or more parties, at least one of whom is a member of an organization or system under study and at least one of whom is an external researcher, to work together in learning about how the behavior of managers, management methods, or organizational arrangements affect outcomes in the system or systems under study, using methods that are scientifically based and intended to reduce the likelihood of drawing false conclusions from the data collected,

with the intent of both improving performance of the system and adding to the broader body of knowledge in the field of management. (Pasmore et al. 2008: 20).

In CMR, collaboration is understood, among other things, as genuine cooperation between managers and external researchers in co-creating the research agenda, including selecting the research theme, choosing methods and design, gathering empirical data, conducting preliminary analyses, as well as identifying and planning managerial actions. In the established learning space, cyclic processes are often employed, focusing on experimenting with managerial actions within the organization, dialogic exploration, reflection processes, sense-making, and other learning mechanisms that support both performance and learning (Shani et al. 2012; Canterino et al. 2016; Shani 2023).

Although Pasmore et al.'s definition of CMR includes the possibility of interorganizational groups, this aspect is rarely described or researched. Most CMR literature describes studies where the managers come from the same organization. However, there are also a few examples where the group of managers come from different organizations. This form of interorganizational CMR can be seen as related to network action learning, interorganizational network, and interorganizational learning (Coghlan and Coughlan 2008; Mirvis 2008; Coghlan and Coughlan 2015).

From these approaches, we find learning networks (Coghlan and Coughlan 2015) particularly useful in the study of how ICMR might support managers leadership agency. In learning networks, managers meet to explore learning opportunities both within participating organizations and between them. Issues faced by individual managers or organizations are brought to the network for discussion and analysis, with the insights and ideas generated then taken back to their respective organizations for implementation. These networks aim to enhance knowledge and capacity to act (Coughlan et al. 2021). Mirvis found that despite the diversity among participants and the participating organizations, a shared professional identity and common interest in the network's topics (in our study, a strong interest in leadership and an identity as managers) united the managers. Mirvis also notes that, over time, there is a shift towards a "we," a collective identity, where participants see themselves less as

What are the potentials of interorganizational collaborative
management research in mobilizing leadership agency?
Jan Rohwedder
Søren Frimann

representatives of their respective organizations and more as members of an informal "give and take" group. Being a manager in an organization can be emotionally and physically demanding, and the opportunity to share experiences with peers in similar positions in other organizations and the mutual support encourages participation in an interorganizational group (Mirvis 2008).

Methodology

In this section, we describe our methodology and research design in relation to ICMR.

In CMR as in action research, researchers and the participants collaborate to make sense of and create a desired change or development, while research is carried out during the process. The collaborative process aims to generate actionable knowledge (Argyris 1996) that addresses real-life problems while contributing to academic theory development.

CMR often takes place in a cyclical research process, where purposes and contexts are examined prior to constructing (theme, development, challenges), planning action, acting, and evaluating action (Coghlan 2019). The approach is grounded in pragmatism (Dewey 1933; Dewey and Bentley 1949), participatory inquiry, practical knowing, experience, and reflexivity (Chandler and Torbert 2003; Shani et al. 2012; Shani 2023;).

Practical knowing is always incomplete, processual, and aimed at finding out how to think and act in relation to a challenge or concrete situation. In this way, researchers and practitioners engage in the messiness that characterizes the development of knowledge about collaborative management research (Shani et al. 2012).

To establish a learning system in the ICMR group, we conducted relationship building and designed a set of learning mechanisms that allowed the ICMR group to co-inquire, co-create, and collaborate to develop each manager's leadership agency in relation to current challenges and pressing issues in their role as managers in their respective organizations. In addition, researchers and managers in the ICMR group collaboratively investigated and developed the learning mechanisms and were analyzing, generating hypotheses, and validating data throughout the process. Examples of learning mechanisms used to develop leadership agency is the reflective team (Andersen 1987) and Karl Tomm's reflective question types

What are the potentials of interorganizational collaborative
management research in mobilizing leadership agency?
Jan Rohwedder
Søren Frimann

(Tomm 1988). These mechanisms were used systematically to facilitate dialogue and explore and jointly challenge the managers' experiences, opinions, assumptions, values, and narratives about themselves, each other, and their managerial challenges.

The project was carried out over half a year, during which a full-day start-up, three four-hour workshops and a final full-day workshop were held. Between the workshops, the managers worked with experimenting actions in their own organization, which then became the subject of an evaluative and collaborative inquiry at the following workshop, which led to identifying new actions, etc. Data has been generated from all workshops in the form of audio recordings, which have been transcribed. Furthermore, through each manager's work with a development theme, a researcher has created a visual scaffolding (Jordan 2016), where the most important themes and statements were written down on a poster. In a following joint inquiry process, the participants in the ICMR group practiced "gift giving" in the form of Post-its with reflective questions, suggestions, and thoughts, which have been placed on top of the visual scaffolding poster to promote learning, critical reflexivity, leadership development, and actions for each manager's developmental work. This was documented through photos of all posters during the project period. In addition, the researchers have given presentations on central theories and management-related research themes, i.e., positioning theory and reflexivity. These presentations are stored in the form of PowerPoint presentations.

After the third workshop, the researchers analyzed themes and patterns across data (Braun and Clarke 2006). Against this background, the researchers prepared a presentation of preliminary findings, focusing on how ICMR might support and promote managers' leadership agency. At the fourth workshop, the ICMR group collaboratively validated these findings (Flick 2022). The group discussed whether they could recognize the findings and if they reflected their experiences. Additionally, the participants were asked about any missing elements in the findings and what could enhance the descriptions. The participants were able to identify the central themes and, simultaneously, provided several suggestions for improvement, including adding themes not initially included in the preliminary findings. The groups' corrections and suggestions

What are the potentials of interorganizational collaborative
management research in mobilizing leadership agency?
Jan Rohwedder
Søren Frimann

for adjustments were incorporated into the findings presented in the next section.

Findings

Below, we present some of the joint findings on the potentials of ICMR in mobilizing leadership agency. We point out that fulfilling the following conditions in ICMR provides a strong foundation for the group's support for managers' development and actions.

Foundational conditions in ICMR

First, all participants must be genuinely committed to collaborative inquiry within the ICMR group, to a significant extent, and to the self-chosen development project within their own organizations.

Secondly, psychological safety, support, and recognition are crucial. This environment allows for the discussion of "difficult topics" and the expression of a manager's uncertainty and vulnerability as a manager. It is advantageous when the ICMR group can openly discuss managerial problems and leadership issues without fear of competition or loss of status and respect. This contrasts with the positioning and power relations within one's own organization, which are often experienced as obstacles to open communication.

The importance of psychological safety is stated this way by two of the managers.

A: You can be competitors in your own organization, and that is not the case here.
B: So here you can talk beyond those roles, and have a free space to maybe express what really matters, uhhmmm...

Two other managers discuss the nature of relationships within the group, emphasizing that relations should include the desire and courage to challenge one another.

C: And we also know each other so well by now, that we know where we can and should challenge each other.
D: Yes, where we can push each other. And how hard we can push!

Thirdly, the collaborative work involving critical reflection and reflexivity is highlighted as promoting development and agency. In-

What are the potentials of interorganizational collaborative
management research in mobilizing leadership agency?
Jan Rohwedder
Søren Frimann

sights from external participants from various organizations in the
joint inquiry and sparring have, among other things, led the man-
agers to become more reflective and clearer about their own opin-
ions and the underlying assumptions at play. This has facilitated
both clarity and decisive action, as one of the leaders mentions.

> It is the contradictions that drive it [...] it is a different space
> when someone from the outside comes in [...] Otherwise,
> I'd just stick to my own beliefs [...] So talking it through
> with others, I actually find out what I really mean.

Outcomes

It has been important for the group members that their participa-
tion in the research project yielded tangible results for their organi-
zations and for the managers themselves. The empirical data indi-
cates numerous outcomes, some of which are presented below.

One manager stated that if he had not participated in the ICMR
group, he would have abandoned his change project in the organi-
zation. The commitment to the group and the strong relationships
established within it encouraged him to persist. He acknowledged,
thanks to the group's support and insistence, that changes often
take longer than his patience typically allows. The manager high-
lights how experiences from other organizations have reinforced
his decision to continue with the project, which, after four months,
is beginning to show an organizational outcome:

> And then you might say, as a group, it is extremely inspir-
> ing to hear what others are doing. Your experiences and
> practices that challenge my practice. I think it's great to
> learn from tried and tested examples from other compa-
> nies. So, if it works in another context, maybe it could
> work in mine too.

Another participant gave an example of a personal outcome. The
manager faced a very complex task without support from the other
managers in the organization. This lack of support caused such
frustration that it led to sleepless nights and other issues.

The collaborative inquiry within the "free space" of the ICMR
group changed the manager's perspective. The diverse inputs made

What are the potentials of interorganizational collaborative
management research in mobilizing leadership agency?
Jan Rohwedder
Søren Frimann

the challenges more manageable, partly because the manager was able to move from emotional frustrations to viewing the problem as a task that can be addressed.

> So, I get the chance to see myself a bit from an outside perspective, and suddenly I see it as a situation that can be improved. It's all about separating the task from the person. There's some frustration […] but now I can do something about it.

We conclude the description of the findings with three brief examples of how participation in the ICMR group has mobilized and enhanced leadership agency within the managers' organizations.

Inspired by a group member's experiences in acknowledging mistakes, one of the managers introduced discussions about "the week's mistakes" in a project manager forum as a concrete element in promoting psychological safety.

Another participant from a highly practice-oriented and data-driven organization was inspired to adopt an academically investigative approach by conducting interviews in his change project. This systematic approach led to greater acknowledgment and support from the director, as the project was now based on data.

A third leader, inspired by ICMR methodologies, established two leadership networks across departments within her organization. The purpose is to create access to a facilitated space for discussing leadership and sharing knowledge among departments.

In addition to the above findings, we provide examples of potential tensions that may arise when working with ICMR.

Simultaneous commitment – a double-edged sword?

As previously described, the managers' full commitment and strong relationships in the ICMR group contribute to the quality of the group's work and the sense of unity. (If everyone does not commit, the ICMR group's work becomes less inter-organizational). Additionally, an ICMR group is characterized by the managers having to also handle a wide range of leadership and management tasks in their own organization, which also simultaneously requires their commitment. The study shows that doubts, guilt, and feelings of failure can arise among the managers, as they try to balance their

What are the potentials of interorganizational collaborative
management research in mobilizing leadership agency?
Jan Rohwedder
Søren Frimann

commitment. That is why it is particularly important that the projects are relevant for the organizations and that the struggles and feelings are facilitated by the researchers.

The importance of differences in ICMR processes

The managers in the study each dealt with complex problems in their own organizations. To address these issues, we designed the learning mechanism "giving gifts" (as described in the methodology section) within the ICMR group. This mechanism leveraged the participants' diverse perspectives and varied understandings. During the project period, two patterns emerged in these "giving gifts" activities, revealing at least two different ways of perceiving support, recognition, challenge, and problem-solving.

Questions/comments focusing on	Questions/comments focusing on
Challenging	Supporting
Structural/organizational handling	Relational/psychological handling
Creating progress	Confirmation and reassuring
Rational arguments	Emotional arguments
Offering completely new perspectives and thoughts	Offering perspectives that enrich/strengthen known thoughts

We assume that some of these differences arise because the managers differ as individuals. Additionally, we believe that local organizational cultures influence the patterns that emerge in the managers' questions and comments. Throughout the process, the group became aware of the value of these differences and the importance of diverse pre-understandings in reflection processes and the facilitation of these differences. For future ICMR projects, we suggest maintaining ongoing attention to these mechanisms.

What are the potentials of interorganizational collaborative
management research in mobilizing leadership agency?
Jan Rohwedder
Søren Frimann

Conclusion

This study has demonstrated the significant potential of interorganizational collaborative management research (ICMR) in mobilizing leadership agency and fostering leadership development. By using specific learning mechanisms in establishing a psychologically safe, dialogic learning space, managers from diverse organizations engage in collaborative inquiry, critical reflection, and mutual support. This environment promotes openness, trust, and the willingness to challenge one another and one's own assumptions, enabling managers to explore new perspectives, validate their experiences, and develop actionable strategies for and in their organizations.

Our findings highlight the importance of psychological safety and the positive impact of external perspectives, which enhance managers' clarity and decision-making capabilities. The collaborative structure of ICMR facilitates tangible organizational outcomes, motivating managers to persist in their change initiatives and leading to meaningful improvements in their leadership practices. Additionally, the study underscores the value of diverse perspectives in problem-solving and the need for balanced commitment to both the ICMR group and individual organizational responsibilities.

Overall, the research contributes to the understanding of ICMR as a robust approach in mobilizing leadership agency and development, emphasizing its role in creating a supportive and dynamic learning environment. Future research should continue to explore the nuances of interorganizational collaboration to further refine and expand the applications of ICMR.

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Jan Rohwedder
Søren Frimann

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Jan Rohwedder
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Jan Rohwedder
Søren Frimann

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Jan Rohwedder
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What are the potentials of interorganizational collaborative management research in mobilizing leadership agency?

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Generating social capital between people management and dynamic change

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Abstract

This article presents an action-research experience as an emblematic expression of new ways of generating value and organizational processes. The subject is related to the management of pre-schools, in which civil society takes responsibility for micro-processes that guarantee the generation of collective value for the community and the maintenance of a connective tissue through which narratives, stories, and experiences take root. Stories become relationships, networks of trust and collaboration with widespread availability that translates civic consciousness into actions, initiatives, and projects.

The article's contribution illustrates the challenges faced and the organizational processes activated with the different stakeholders involved in the system of activities considered, through a situated and conversational research-action approach (Shotter 2007), according to a dialogic research-action perspective (Shotter 2010). The results highlight the elements of social capital generated, as well as the critical issues that emerged in the work within the socio-organizational and community contexts.

Introduction

This contribution describes a process of situated and conversational
action research (Shotter 2010) aimed at generating social capital by
investigating processes and practices of communication and social
participation among the actors of a network system of pre-schools.
The experience presented can be considered one of many emblematic examples of the complexity of today's organizational and social
contexts, in which it is necessary to co-construct dialogical and relational processes useful for crossing and sustaining the dramatic and
difficult changes that our social, civil, geopolitical, economic, productive, and historical coexistences are experiencing.

The paper is developed by initially recalling the theoretical and
epistemological anchorages on which the experience described is
based. The main characteristics of the context, the cognitive questions assumed, and the methodology adopted are then outlined.
Finally, the results achieved are presented and discussed, and suggestions for future research are set out.

The possibility of being a resource in the multifaceted context of
childhood education, nurturing an authentic strategy of building a
new social coexistence, is based on certain anchorages and basic assumptions that we present below.

The aim of this study is to demonstrate the effectiveness of an action research process in generating situated and contextual knowledge that can provide rich and diverse insights for promoting
learning and transforming work practices within a complex organizational setting characterized by a multiplicity of stakeholders.

The first anchorage refers to the adoption of a socio-constructionist epistemology and a gnoseology that represents knowledge as
the outcome of participatory construction. We can identify as a synthetic figure of this approach the distinction/conjunction between
knowledge understood as a possession and as a product, deposited
in disciplinary knowledge and symbolic-cultural elaborations, and
knowledge in the sense of knowing as a process and dynamic use
(Lanzara 1999) within a field of meanings that is activated within a
system of activities (Engeström 2009). The perspective is that of an
abductive thought aimed at interpreting situations, activating a

Generating social capital between people
management and dynamic change
Emanuele Testa
Silvia Ivaldi

"circumstantial work" (Ginzburg 1979; Zanarini 1992) of listening to reality and dialogical construction of the possible meanings attributed to it, and equipping people to inhabit organizations with a mental disposition oriented towards research and the joint and situated construction of knowledge (Scaratti and Ivaldi 2021; Ivaldi and Scaratti 2019).

The second anchorage resides in the emancipatory and transformative connotation understood as an agreed and concerted space of joint investment in processes of evolution, which are emerging and considered salient by the actors involved (Scaratti 2021).

On the one hand, the transformative emphasis urges the activation of substantial sense-making processes (Weick 1995), raising attention spans and states of alertness to intercept signals of what is happening and developing high resilience to internal and external turbulence. On the other hand, the emancipatory aspect focuses on the need for organizational members to engage in transformative processes and adopt agile, ad hoc work models in response to changing scenarios (Mintzberg 2009).

The third anchorage concerns the perspective related to the generation of social capital, of which the organization under study here is an emblematic interpreter and witness (Testa, Ferrai, and Scaratti, forthcoming). A recurrent definition of the concept of social capital identifies it as a set of the various relational networks, characterized by dimensions of trust, cooperation, and civic awareness, which characterize socio-organizational and community aggregates (Lin 2017). The construct of social capital has been used to analyse various social phenomena, including economic relationships (Granovetter 1973), institutional interactions (Putnam 1993), and trust in social relations (Fukuyama 1995).

Given the plasticity of the concept, and the debate still open in the scientific community on its role in the production and reproduction of forms of sociality at various levels, it is possible to converge on a configuration of the construct of social capital as a situational and dynamic concept, enhancing its relational nature about the multiple social dynamics it supports. Interesting in this regard is the distinction between the social capital of solidarity, which is more linked to networks in tightly knit groups, and the social capital of reciprocity, which is connected to specific intentions shared by actors linked by weak ties between them. The intertwining of these

Generating social capital between people
management and dynamic change
Emanuele Testa
Silvia Ivaldi

plural resources of networks of relations can generate the possibility for local actors to influence the development of an area in terms of positive qualification. In this case, the set of knowledge and specializations present in an area prevail over mere interests and cost advantages linked to the location of external initiatives.

This connection, however, is not taken for granted, given that the impact of social capital can also be negative, fuelling clientelism, political dependence, or even forms of corruption, such as in mafia situations strongly sustained by particularistic ties and networks of family, kin, and clan relations.There are two risks to be considered (and avoided) in the consideration of the potentially positive role that the cooperative and fiduciary dimensions, typical of social capital, can play in the development of a territorial community. On the one hand, the underestimation of the political and institutional factors that can influence (facilitating or hindering) the rooting of a local connective and relational fabric, and on the other hand, the possible particularistic drift of relational networks, exposed to the temptation of opportunistic/electoral/clientelistic declinations of trust and collaborative resources.

Considering these risks implies the possibility of using the construct of social capital in a dynamic perspective, highlighting the political-institutional conditions of economic-organizational support, of participatory processes to be triggered, which constitute indispensable elements for releasing the generativity of social capital, and reducing/eliminating the dangers of political opportunism, robbery, and predation that conceal the possibility of existing social networks functioning as a resource for local development. The federative and connecting role between the different local contexts, engaged in the development of educational projects in the various territorial communities, represents a balancing factor between public resources, the market, and the third sector in the configuration of different networks between collective subjects, according to a logic that Minztberg (2009) defined as integration between three Ps: public, private, and plural.

The context

The case study presented below was carried out in a federated context of pre-schools in a Northern Italian region, involving some thirty realities, each managed by an autonomous body, associated

Generating social capital between people
management and dynamic change
Emanuele Testa
Silvia Ivaldi

to a network system supported by a second-level body that offers associated school coordination services, school management, staff training, and fiscal, accounting, and legal assistance. In each pre-school, the following operate: the institutional roles of presidents and members of the managing body (voted by the parents); coordinators, trainers, and researchers belonging to the federal body; teachers and auxiliary staff; and the parents of the children attending the schools.

The schools are aggregated into circles according to an aggregation that emphasizes geographical affinities in their territorial location.

The intervention was carried out between the years 2020 and 2022 and involved the various actors mentioned above. The managing body is responsible for the overall functioning of the school (economic, organizational, and logistical); it is supported by the second-level body (the federation of schools) and is elected every four years by the assembly of parents belonging to the school.

Methodological aspects

The pathway described here began with a discussion on the dynamics and practices of communication between schools and families, using a participatory reflection among the various players in the school system under study: teachers, coordinators, presidents, trainers, and parents. The main questions that generated and produced the research action are as follows:

- How do parents of children in pre-school perceive the way pre-school teachers work?
- What representations have been formed and which ones are circulating most about the didactic-educational approach in use, which sees at the centre of learning the interaction between children and their social-relational agency?
- In terms of these aspects, what are the teachers' representations of what parents think and experience concerning their proposals as professional adults?
- Regarding the teachers' representations of what parents think and experience towards them, in which situations are they congruent and when are they less so or distorted?
- What are the most commonly used communication strategies to address these issues?

Generating social capital between people
management and dynamic change
Emanuele Testa
Silvia Ivaldi

From these questions, the action-research work commenced, using various qualitative devices according to the following sequence of steps:

- Identification of four organizational actors to be involved in the action-research process: parents, teachers, auxiliary staff, and members of the governing bodies.
- Establishment of 16 focus groups, each with eight participants, involving at least one person from each pre-school, with groups distinctly formed for each type of interlocutor in the life of the schools, thus favouring the co-construction of narratives between homogeneous actors. These 16 focus groups were created by selecting participants from their respective organizations, with one participant representing each pre-school. Gender diversity was ensured within each focus group, while maintaining homogeneous roles: four focus groups were comprised exclusively of teachers, four of parents, four of support staff, and four of members of the managing bodies. This approach aimed to promote discussion among individuals with similar roles and to facilitate a comparative analysis of the narratives produced across different roles.
- Creation of eight focus groups, each composed of eight participants, involving the different actors jointly in them, thus favouring the co-construction of narratives between heterogeneous actors. Each of these eight focus groups was conducted within a pre-school, bringing together participants with different roles in the same focus group. This design aimed to encourage narrative production among individuals from the same organization while fostering diverse perspectives within each group. The focus group method was chosen as a research tool since it facilitates knowledge production through anchoring the participants in real situations and, thus, is situated and contextual. This approach encourages diverse perspectives during discussions and in the analysis phase by comparing the outcomes of each group. Each focus group was conducted by two researchers, one serving as the facilitator and the other as an observer and note-taker, using the same set of questions for each session.

Generating social capital between people
management and dynamic change
Emanuele Testa
Silvia Ivaldi

- Transcription of the focus group narratives, audio-recorded during the focus groups, and a first level of content analysis of the materials.
- First thematic analysis of what emerged from the focus groups and critical elaboration by one researcher and four coordinators. The thematic analysis was conducted as follows: Each of the two researchers individually examined the complete set of written texts generated from the focus groups, and the same analysis was conducted separately by the four coordinators. Subsequently, the six individuals shared the results of their individual findings to converge into a collective outcome.
- Restitution, interpretation, and validation of what emerged by the research team with each group met for the focus groups.
- Involvement, in some available schools, of some children for a small group discussion on some action-research objects, which became the object of further reflection and in-depth study.
- Sharing of what emerged in the focus groups with about 180 pre-school teachers involved in the action-research work and an indication of improvement trajectories concerning communication practices between schools and families.

Results and Discussion

The material produced during the focus groups allowed for a consistent and articulated variety of cognitive elements (Testa and Scaratti, forthcoming), of which we report in this contribution only three of the main outcomes acquired through the work carried out.

A) The register of listening and the use of language

A first outcome concerns the register of listening and the consequent use of language in the communicative processes between teachers and parents: the importance of engaging in reciprocal listening through clear and explicit language constitutes an essential element, without which not only the focus of the school's didactic-educational proposal seems to be compromised but also the professional and scientific intentionality that sustains some of the teachers' approach choices. Two aspects seem to be particularly important in this respect:

Generating social capital between people
management and dynamic change
Emanuele Testa
Silvia Ivaldi

- The use of a vocabulary concerning epistemological and methodological aspects of didactic-educational choices, capable of conveying concepts that are accessible to those who are not "insiders" as they do not belong to professional school and learning communities, as is the case for most parents. An interesting element of this emerged in one of the focus groups with parents, from which the following narrative sequence is extrapolated:
  Parent: "When you present to parents at the beginning of the year—especially during assemblies—it's crucial to consider the way you tell the stories. Not all parents have the same ability to understand and perceive what is happening within the school. Therefore, in certain types of presentations, the ability to convey complex concepts is essential."
- The need to make the most of formal contexts, such as meetings and interviews with parents, and of occasional spaces of discussion, more characterized by informal modes, such as those at the children's entrance to the school and at the exit when parents and teachers meet at the end of the school day. It emerged that these situations constitute valuable moments to nurture a narrative continuity between the actors involved, although it should be noted that the informality of these verbal exchanges does not allow entry into more complex content concerning the concept of the child, the pedagogical approach at the school, and events in the school community.

B) The register of seeing and its related communication channels
A second aspect that emerged from the focus groups as distinctive for fostering communication processes between schools and families concerns the register of seeing and the related different communication channels that are used in the context under study. Here, there is a particularly relevant reference to visual artefacts, such as videos showing sequences of schoolwork activities between the children and with the teachers. In addition to the videos in the focus groups, the communicative effectiveness of the documentation displayed at school is repeatedly emphasized, in which, alongside transcripts of conversations between children and teachers, sequences of explanatory images are shown that facilitate parents' understanding of the didactic-educational activities being described.

Generating social capital between people
management and dynamic change
Emanuele Testa
Silvia Ivaldi

Here are some transcripts of what emerged in the focus groups with parents:

Parent A: "Seeing how children experience what [the teachers design] for them, this is for us [parents] easier to absorb because let's face it, it's not like all parents know about education or child psychology. [The videos help them to understand] how their child experiences what [the teachers propose] and so through that it is easier to absorb also what is the (...) educational project for the children."

Parent B: "It was interesting the photo exhibition that was held, so the children would take home an album with photos, drawings made by them. In that way, my child also explained to us what she had done during the day and the various projects."

The use of video recordings, as emerged in the focus groups, is also effective when their use takes place during meetings with parents, as explained in the following narrative sequence extrapolated from a focus group with parents:

Parent A: "[...] I appreciated the clear manner of the teachers' explanations and seeing the pictures of the children during the activities: seeing my daughter integrated in the group and interacting."

Parent B: "[...] Seeing what our children do allows us some involvement."

Parent C: "[...] I really appreciated that there was material regarding the children's activities (photos, videos) and the sharing of videos where we could see the school dynamics between children and between children and teachers."

Parent D: "[...] It was also very interesting to visit the section."

Parent E: "[...] It is very nice to see the children involved and attentive to what they have to do."

Based on what emerged from the focus groups with the teachers, for them, too, the use of visual channels constitutes a mode that fosters understanding and communication, as can be seen in the conversational cross-section below:

Generating social capital between people
management and dynamic change
Emanuele Testa
Silvia Ivaldi

Teacher A: "When you have meetings accompanied by PowerPoint, videos, and photos where parents see their children perhaps in action, it is certainly more engaging than the meeting where you just read or explain the annual plan. That gets boring after a while."

Teacher B: "There, yes, I would say that is true. A parent who sees the PowerPoint where his or her child is also, then goes away happy because they say that even the documentation that is displayed [at school] they can read it with different eyes. They can understand because they have seen experiences that the children have with our explanations."

C) Living/making living an experience that helps in understanding

The third element that emerged from the focus groups concerns the register of living/making living and refers to a promising practice that is particularly effective in helping parents to understand the didactic-educational choices of the federated system of pre-schools and, thus, the teachers' didactic-educational work with the children. It refers to meetings between teachers and parents in which the latter are invited to activities that are carried out at the school. This allows them to experience first-hand what happens in the didactic-educational work. The school system under consideration is characterized by epistemological and methodological choices of a socio-constructivist approach, from which the activities of the children in school in small groups is emphasized in order to encourage their active participation in the co-construction of narratives and actions. In some pre-schools, this same activity was proposed to parents and, according to the findings of the action-research, it proved to be particularly effective for parental communication. The qualifying and indispensable aspect, in this respect, turns out to be the meta-reflection work on the experience carried out between parents in small groups, accompanied by the teachers through the highlighting of what happened between parents and the relationship of this with the school context. Here are some narrative insights into what emerged in a focus group with teachers:

Generating social capital between people
management and dynamic change
Emanuele Testa
Silvia Ivaldi

Teacher A: "Last year, parents came into the classroom and one evening (...) we divided the parents into small groups (...)."

Teacher B: "The parents were a little bit puzzled when they realized that there was a pencil on the table, that there was glue, that there was material only, really, for one person, OK? And that's when we explained that they had to be able to talk to each other. They had to be able to agree."

Teacher A: "Then we made documentation, just through photos and writing, and also to put outside in the hall, for everyone, even the others, those who unfortunately could not come (...)."

Teacher B: "And, in comparison (...) of what are the face-to-face meetings (...) there was really a large participation that we did not expect."

Conclusions

The research-action presented here activated participatory movements and transformative micro-processes within the various contexts involved concerning the work objects investigated, highlighting a relevant coherence between the cognitive objectives of the pathway and the research-action methodology adopted for their acquisition. The reconnaissance of communication and participation practices between schools and families actively mobilized the various actors present in the life of the schools, with important repercussions on the relational level, activating spaces for co-construction and discussion, developing new narratives, and facilitating moments of listening and comparison that nourished the research process itself and the reconfiguration of important aspects of the object under investigation.

The investment of participation in communication and shared educational planning in schools can be considered with all evidence as an emblematic expression of a generation of social capital for two reasons: first, for the experience of reciprocity experienced in the common listening/seeing/experiencing of different intentions that recognize themselves in the common awareness of constituting a resource for the territory; and second, for the dimensions of trust, relationship, cooperation, and responsibility that

Generating social capital between people
management and dynamic change
Emanuele Testa
Silvia Ivaldi

constitute authentic expressions of subsidiarity, belonging, and civic and community awareness.

The practical implications of the findings from this action-research study could include, for example, training programmes aimed at enhancing teachers' communication skills during parent–teacher meetings, as well as implementing innovative systems that utilize visual channels to help parents better understand the school's working methods. Additionally, programmes could focus on strengthening teachers' abilities to conduct effective parent–teacher conferences.

Future research could explore new communication practices developed from the outcomes of the action-research presented in this study. Additionally, the categories identified in the thematic analysis could be investigated further through a quantitative study involving a larger participant sample via questionnaires. While this work provides an in-depth analysis of the studied practices, its limitations relate to the representativeness of the sample.

These precautions also aimed at assessing the risks mentioned in the introduction that an approach like the one adopted may entail, namely the underestimation of political-institutional components and the particularistic drifts that a narrative production may lead to.

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Generating social capital between people
management and dynamic change
Emanuele Testa
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The Letter of the Law
Insights from Italy's Anti-Poverty Measures About Managing in Social Services

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Abstract

This study aims to reconstruct the organizational processes involved in managing the uncertainty surrounding the implementation of a new anti-poverty measure in Italy. In 2024, a reform of the minimum income scheme significantly redefined the role of social services in assessing and supporting the social inclusion of beneficiaries. Using an Activity Theory framework, this paper analyses a case study from a suburban area in Milan, focusing on the turbulence encountered during the transition, the development of the care script, and the disturbances that occurred. The analysis draws on ethnographic fieldwork, including participant observation and semi-structured interviews with public and private social workers engaged in implementing the reform. This study underscores the critical role of organizational cultures in fostering the effective application of horizontal subsidiarity principles in contexts characterized by structural uncertainty.

Background and local context

In Italy, the implementation of minimum income policies is relatively recent compared to other European countries. The introduction of the Inclusion Income (*Reddito di Inclusione*, REI) in 2017 marked the first nationwide scheme aimed at combating poverty. This measure assigned a pivotal role to social services, which were responsible for collecting applications and assessing applicants' needs (Gori 2016). To facilitate this process, new resources were allocated to local authorities, allowing them to expand and organize their staff in line with the increased workload.

In 2019, the Citizenship Income (*Reddito di Cittadinanza*, RDC) replaced the REI, offering even greater resources to social services. However, the RDC modified access procedures, shifting away from social services as entry points. Instead, applications were submitted directly to the Italian Social Security Institute (INPS), either independently by citizens or through workers' welfare associations and tax assistance centres.

In 2024, the minimum income scheme underwent another reform with the introduction of the Inclusion Allowance (*Assegno di Inclusione*, ADI). Under this new framework, social services continue to promote inclusion pathways for approved applicants, as was the case with the RDC. However, their role has expanded to include the assessment of cases requiring intervention, particularly for individuals in vulnerable conditions. Unlike previous schemes, the ADI includes vulnerable individuals as beneficiaries, even if they lack family characteristics initially required for eligibility, such as minors, individuals with disabilities, or seniors in the household. Vulnerability must be certified by public authorities, involving collaboration between various social and health services.

The frequent reforms to minimum income policies over a relatively short period have placed sustained pressure on the reorganization of social services. This has affected not only the responsibilities and workload of social service workers but also the governance dynamics between social services and other sectors involved in implementing these measures.

In Lombardy, public services and private social and health organizations work together through local networks in the implementation of anti-poverty policies, in line with the regional governance model that assigns a central role to private entities in the provision of welfare services (Sabatinelli, De Gregorio, and Pernetti 2023). This study focuses on Pioltello, an area in Milan's hinterland, where such collaborations operate within an inter-territorial structure known as the Ambito Territoriale Sociale (ATS). The ATS serves as a geographical and administrative framework for organizing and managing local social services. In Pioltello, public and private entities collaborate through regular meetings facilitated by the ATS. These meetings particularly discuss access to minimum income measures for vulnerable beneficiaries and organize the subsequent phases after access, such as interviews with beneficiaries, the stipulation of inclusion pacts, and case monitoring.

Theoretical positioning

Contemporary policy studies acknowledge a gap between regulatory frameworks, as defined and published by central governments, and their implementation at the local level. This perspective moves beyond the rationalistic assumption of complete adherence between regulations and actions, recognizing the implementation phase as a complex, situated, and social process.

In addressing the challenge of translating a regulation into courses of action, the tension between *organization* and *organizing* becomes evident (Czarniawska 2013). Organizing is at the core of a network of co-evolving actions that do not necessarily adhere to organizational boundaries. During implementation, decisions are made, and forms and levels of interdependence are negotiated, while strains arising from different organizations' missions, distributed agencies, and pressures from external actors converge (Altenstetter and Björkman 1981).

This article adopts a perspective based on the Activity Theory model, as redefined by Engeström (1999, 2000). In particular, we base our approach on Engeström's *third-generation activity theory*, which orients the analysis of complex phenomena from a single activity system towards multiple ones (Engeström and Glăveanu 2012). According to this theory, actions unfold across three levels of complexity, which are defined in relation to the intentionality of

social actors / agents: activities, guided by goals; actions, guided by objectives; and operations, which contend with situational constraints. Each action, in turn, reconstitutes a structure that integrates both macro and micro levels of social and cultural complexity, which can be traced following the structure of the activity system itself (Engeström and Sannino 2021). In this structure, the core element is the relationship between the subject and the object (understood as a constructed object or artefact), mediated by instruments. The subject has a relationship with a system of rules and a reference community, while the object reveals how the same community that created it organizes itself in terms of the division of labour.
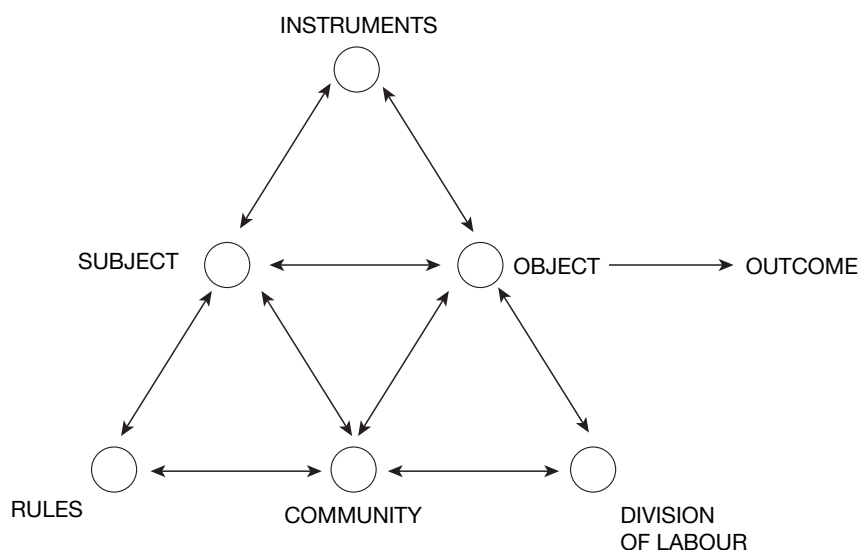

Figure 1. Model of the human activity system by Engeström (2000).

Within local dynamic fields, decision-making processes tend to produce scripts defined within the activity system itself (Daniels et al. 2013). In our case, the most interesting aspect concerns the scripts produced during the assessment of the beneficiaries and the access to the social services, with particular attention to the role of health and social organizations in service management and how shared case management is carried out.

However, the system of relationships between various parts of the system can undergo changes. Deviations from standard scripts can be defined as *disturbances* (Engeström 2000); these indicate sig-

nificant systemic contradictions within the activity and express, among other things, the potential for change within the activity itself (Engeström 2014). Therefore, studying the configuration of activity systems and the disturbances among different actors when introducing a new policy can help understand the complexity of the implementation process. Moreover, it highlights that disturbances can reveal moments when the process stalls and preludes to change, thus serving as a crucial tool in identifying the process of service improvement.

Methods

The objective of this exploratory research is to study an implementation case within the ATS of Pioltello, considering the quality of collaboration between social services and other health and social entities, as well as among different professional roles, in the alternation between two minimum income policies (RDC and ADI). To achieve this, an ethnographic research design was constructed.

This study is part of a larger action research project designed to better understand the dynamics of inter-organizational collaboration in the field of anti-poverty policies, with the general aim of improving the level of collaboration between organizations. In particular, one of the researchers serves as an organizational supervisor within the social services of the ATS. Based on critical reflections from the ethnographic study, the researcher will collaborate with stakeholders to develop new discursive spaces and professional perspectives.

In the considered territory, meetings within the social service (*Riunioni di Servizio*) were chosen as the privileged observation point. In these meetings, social services and other social entities come together to define the implementation of anti-poverty policies. This occurs both at the level of individual cases, through the definition of support provision, and at the general level of the overall collaboration framework between services. The investigation took place from September 2023 to May 2024, coinciding with the implementation of the new ADI scheme.

The research techniques employed included participant observation in 11 service meetings and 28 interviews with all the informants who are part of the ATS, specifically aiming to explore the implementation of the ADI scheme. During the participant observation,

field notes were taken both during and after the meetings. Furthermore, five meetings were video-recorded and subsequently transcribed. Five additional interviews were also recorded and transcribed. All available material was then analysed through thematic analysis (Braun et al. 2019), with the primary goals of reconstructing the activity system within the meetings, particularly focusing on the assessment and support provision phase, and identifying the possible disturbances. Following the reflexive thematic analysis methodology, the research began with familiarization with the dataset, proceeded to coding, and generated initial themes through grouping. These themes were subsequently developed, reviewed, refined, and named, as described in the following section.

Results

The analysis of the collected material led to the identification of several general themes concerning the challenges faced during the transition from the old to the new measure. Moreover, it allowed for the reconstruction of the process of accessing the social service from the operators' perspective. Lastly, the main disturbances encountered during the fieldwork were identified. The following is an analysis of these three elements.

First theme: Challenges faced during the transition

The first element to emphasize is the substantial destabilization within services caused by the transition from RDC to ADI. The new legislation was not immediately accompanied by the necessary implementation regulations, and when they were published, they proved to be fragmented. Citizens, who initially learned about the change through media and social media, received an official notification via a text message sent by INPS, informing them of the RDC suspension. In this context, a series of phenomena associated with turbulence became quite evident. Metcalfe (1978) described this turbulence in terms of the interaction between regulatory frameworks and territorial contexts. These turbulences have affected the inter-organizational network on multiple levels: beneficiaries have experienced emotionally charged subjective states, such as fear, confusion, and frustration; the operators, on the other hand, faced with uncertainty, have recognized the need to build new knowledge, both in cognitive terms (acquisition of information useful for

configuring their operations) and relational terms (sharing the emotions associated with the uncertainty itself).

They thus took action to collectively study the legislation, the implementing decrees, the guidelines, and the interactive webinars organized by the Italian Ministry of Labor and Social Policies. In addition, they engaged in team discussions, sent inquiries to the Ministry, and sought consultations with experts. The discussions took place not only with colleagues from the poverty alleviation service but also with other services involved in the measure, primarily the territorial mental health clinics, which contributed to the drafting of the vulnerability certification. These interactions aimed to define their respective roles within the inter-organizational network.

As the operators reflect on the implementation of the new policy, their discourse highlights the differences between what is defined at the central government level and what becomes feasible and sensible in the territorial context.

The greatest turbulence perceived by the operators during the transition from the old to the new scheme is the exclusion of certain previous beneficiaries who are no longer eligible under the new policy design. However, the operators also report that some citizens refuse to become beneficiaries of the new measure due to its stricter requirements for certificates, participation in projects, and the associated monitoring process. This indicates an increase in non-take-up of the measure, which deserves further investigation.

Second theme: The script of access to social services

The collective effort of the operators, demonstrated through their participation in webinars, shared study sessions, training sessions, consultations, and numerous meetings, was evident. In the language of Activity Theory, this effort can be attributed to the *construction of a script* that assembles all the knowledge built during the widespread process of coping with uncertainty. The access script, as described in the interviews, can be outlined as follows. As required by the legislation, a citizen whose application is accepted by INPS is summoned by the social service within 120 days. A preliminary analysis of the situation is then conducted through a semi-structured interview. This interview delves into the reasons for applying for ADI, the social and economic conditions of the household, any

existing debt situations, the individual's health status, housing and employment conditions, and motivational aspects and competencies necessary to build a path with the services. Based on the findings of this interview, priorities are identified, and an inclusion project is designed collaboratively with the beneficiary. This project is binding for the beneficiary if they wish to receive the measure. Adherence is required through the signing of a pact, which constitutes the main tool for promoting change and overcoming the contingent factors contributing to the poverty situation. The law mandates that beneficiaries, after the initial interview, must attend a follow-up meeting every 90 days to monitor their inclusion process. However, the interviewed operators emphasize that they may conduct more frequent monitoring based on individual needs.

Third theme: Disturbances

By reconstructing the script related to the assessment process and follow-up meetings, specific relationships can be identified where tension accumulates, highlighting disturbances within the described framework.

The first disturbance arises from the assessment process, particularly between *subject* and *instrument*. When the social worker attempts to understand the main issues concerning a specific situation, recipients can exhibit voluntary reticence (when they fear punitive consequences from social services) or involuntary reticence (when they do not recognize the importance of an issue relevant at this stage). This is often the case with debt situations, which require the involvement of multiple community members (e.g. landlords, bank operators, financial educators). Consequently, the disturbance shifts to the relationship between the individual and the community.

The second disturbance examined pertains to the timing of social service support and arises between *rule* and *subject*. The 90-day interval between scheduled appointments is sometimes too long. Individuals' initial distrust of social workers can prolong the engagement phase and necessitate a greater number of meetings. Furthermore, there is a significant possibility that recipients may be unable to achieve the goals outlined in the inclusion pact, especially in complex and multi-problematic situations.

However, certain disturbances produce innovative effects, as they mobilize the search for new solutions by involving previously inactive actors in new collaborations. For instance, in some cases, general practitioners and health services play an active role in discussions about inclusion projects, particularly in certifying individuals' vulnerabilities. This development is particularly noteworthy, as it may signify substantial progress in overcoming the longstanding challenges of integrating social work and healthcare, which have been only partially addressed within the Italian welfare system (Perino and Pesaresi 2022).

Another example involves the beneficiaries themselves, who sometimes feel engaged in collectively addressing the challenges related to the transition from RDC to ADI. Additionally, the new collaborative spaces that spontaneously arise among colleagues, as previously mentioned, are important These collaborations emerge from the necessity of developing common scripts.

Discussion and conclusions

The analysis highlights the significant local repercussions experienced during the transition between successive minimum income measures. It highlights how the general turbulence inherent in policy implementation processes impacts specific contexts. Despite central government guidelines and instructions, the study reveals that implementing policies at the local level often necessitates moments of reassessment and redefinition by local actors. These processes aim to align beneficiary assessments and care strategies with the objectives of the new policies while accommodating the organizational structures of the services and actors involved. Using the Activity Theory framework, the analysis identifies several disturbances, which expose both critical issues and innovative aspects compared to previous measures. These findings echo Morin's (1986) conceptualization of knowledge as an *uncertain adventure*, emphasizing the dynamic and evolving nature of understanding in complex systems.

The organizational practices examined in this study should be viewed as evolving, due to the rapid succession of various minimum income measures within a relatively short time frame and the presence of incomplete guidelines. Importantly, the implementation process requires that the transition from a general regulatory

framework to specific local contexts must always involve local interpretation and adaptation. This implies that a certain degree of uncertainty will always exist as an intrinsic aspect of the process.

Addressing the uncertainty arising from the lack of a defined script for local-level implementation, coupled with the level of engagement observed in our study, aligns with the concept of *managerialism* as defined by Jaques (1970). This concept highlights a combination of efficiency, accountability, and imaginative development rather than a specific hierarchical position. In our case study, the final stage of implementation has been delegated to grassroots organizational practices developed through collaboration among local services. This collaboration takes place within specific organizational configurations that may be specially created for this purpose, operating outside established practices, negotiating the nature of their tasks, and coordinating their responses (Edwards and Kinti 2009).

In the case of local welfare, it is crucial to emphasize that the presence of strong organizational cultures is fundamental for fostering innovation and overcoming emerging critical issues. Only in this context can horizontal subsidiarity effectively address the challenges that arise from public policy reforms. The inclusion of local social actors in decision-making processes can lead to more appropriate responses, as the best calibration of policies often occurs at the local welfare level (Burgalassi 2012). Conversely, if organizations are not prepared and supported for this change, there is a risk that the identified disturbances will persist without generating innovation and ultimately without meeting citizens' needs.

In summary, the actors involved in policy implementation processes operate within a socially and culturally rich environment that shapes the boundaries of feasible solutions and legitimate strategies (Campbell 2002). This highlights the importance of an approach to public sector management that promotes genuine subsidiarity and managerialism. As Mintzberg (2020) puts it, "It's not just the letter of the law. The letter of the law is too low a standard" (p. 81).

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