Imaginea—Shifting Paradigms

By

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Executive Summary

Founded in 2013, Imaginea Energy is a Calgary based oil and gas producer like none other in the energy space. With a $300 million private equity investment, Suzanne West, founder and CEO, created the company centred on the planet, people, and profits. As a committed environmentalist and unabashed capitalist entrepreneur West set out with a vision to "create an energy industry that is better for the planet, and for people, and for profits" (Imaginea, 2016, para. 1). West (2014) stated,

> In my industry, you are either a crazy tree hugger or a greedy capitalist. However, I do not know of a rule book that says we cannot make amazing profits and not wreck the planet at the same time. We want to make sustainability part of the fabric of how we do business. (para. 2)

As West set out to build Imaginea, her fifth start-up in 11 years, she created a new organizational structure, a model based on the wisdom of Mother Nature and identified as Elemental Org. Recognizing that the Canadian energy industry was being disrupted by outside forces, West identified this crisis as an opportunity for transformation in the oil and gas business, not only to be a force for good, but to also change the way in which employees work together. By creating a new organizational model, based on self-managing principals, Imaginea has moved toward an organizational structure that, if implemented successfully, has proven to enhance productivity, economic prosperity, and human happiness.

This inquiry commenced with a series of informal conversations with various team members to determine the desired change initiative. Positive energy radiated from those I spoke with; the team members unanimously wondered how to strengthen the organizational model. The inquiry was born, focusing on: How might a dialogic process help Imaginea Energy strengthen its commitment to a self-managing organizational structure? To assist with the inquiry, sub-questions were designed to allow stakeholders to make meaning from their experiences and create opportunities that may allow new versions of the future to emerge. The sub-questions were: (a) What are the stories told by Imaginea employees about their previous experiences with self-management; (b) What are the hopes and opportunities identified by the employees of Imaginea for the organizations full transition to a self-managing organizational structure; (c) How might a self-managing structure help the organization be successful in a VUCA (volatile, uncertain, complex, ambiguous) environment; (d) What conditions does Imaginea currently have in place that foster and support a self-managing system that contributes both to personal well-being and to the achievement of collective objectives; (e) What are the stories told by the Imaginea employees that show widespread distribution of authority where employees are empowered to take a leadership role; and (f) Among the distinctive processes and practices to Imaginea Energy, which ones are important to continue developing in an effort to enhance a self-managing organizational structure?

A review of the literature was completed in order to more fully understand the inquiry question, to be in a supporting position to facilitate Imaginea in moving toward a positive future that they define, and to make recommendations. The literature review was used to help define the philosophy and principles of a self-managing organizational structure together with

understanding the role of leadership and how it can be effectively distributed amongst a self-managing team. These two topics created a foundation of understanding of Imaginea's organizational structure. To build on this foundation, the literature review also investigated the topic of diversity in the workplace.

The literature review uncovered that self-management is not a new concept and has been proven to increase productivity, focus on common goals, increased information sharing, enhanced team performance, has positive association with innovation, and was most effective in complex environments (Druskat & Wheeler, 2003; Hoch, 2012; Moe, Dingsuyr, & Dyba, 2009; Rapp, Gilson, Mathieu, & Ruddy, 2016; Small & Rentsch, 2010; Wang, Waldman, & Zhang, 2014). Further, the literature review cautioned against confusing a self-managing organizational structure with a flat organizational model, which abolishes all hierarchy, or a laissez-faire model, which is defined by its passive leadership style (Antonakis, Avolio, & Sivasubramaniam, 2003; Laloux, 2014; Weisbord, 2012). The reviewed literature discussed required behaviours for a successful implementation of a self-managing structure, which included taking personal responsibility for outcomes, personal continuous performance monitoring, and continuous improvement by taking the initiative to actively seek resources while helping others to do the same (Hackman, 2009, pp. 766–769). In addition to successful behaviours, the literature defined barriers to a full adoption of a self-managing system. These barriers included a lack of buy-in from ownership or formal leadership (Laloux, 2014) to failure to genuinely commit to the team by putting individual goals above team goals; failure to learn due to low team autonomy; and individual leadership as a result of team members not changing the individual, decentralized decision-making process (Moe et al., 2009, p. 22). It was also discovered that "self-managing teams that function well can achieve a level of synergy and agility that never could be preprogrammed by organization planners or enforced by external managers" (Hackman, 2009, p. 772).

This project employed an action research engagement (ARE) model with an appreciative stance. According to Rowe, Graf, Agger-Gupta, Piggot-Irvine, and Harris (2013),

> [The ARE is] a cyclical process of inquiry, dialogue, and deliberation that aims to lead organizational members to: shift in attitudes toward change; open understanding of different points of view on issues and opportunities for change; identify potential approaches to challenges and barriers; generate vision/goals, strategies and actions; and lead to viable action plans for sustainable change. (p. 6)

Further, by using an appreciative stance and focusing on behaviours that Imaginea may want to grow created excitement when the stakeholders saw what might be possible in their organization and the opportunities that may exist in the future.

All 44 Imaginea team members were invited to participate in the methods. To support Rowe et al.'s (2013) ARE model and complement the appreciative stance while honouring Imaginea's corporate culture, six one-on-one semi-structured interviews were conducted. A learning circle, which was attended by nine participants, was held as a follow-up method to the interviews. The data collected from the interviews were rich in content and used to form the basis of the learning circle questions. In Canada, research involving humans is guided by the

Tri-County Policy Statement: Ethical Conduct for Research Involving Humans (Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of Canada, & Social Sciences and Humanities Research Council of Canada [Tri-Council], 2010. The Tri-Council (2010) seeks to ensure that respect for human dignity is the underlying value of all research. Due to the participatory nature of the ARE model, ethical implications involving the participants were considered.

Team members who participated in an interview or the learning circle were invited to share positive experiences as a result of their employment with Imaginea and how they envisioned the future. Using a thematic analysis, verbatim transcripts produced from each method were carefully read and re-read, where quotes were categorized into 13 different groupings. Careful attention was made to ensure that the quotes were used in the proper context and the themes were supported by raw data. Within the 13 different groupings, three significant findings emerged from the data. The first finding revolved around how participants currently viewed their organizational structure. The data showed there was a consensus among the participants as they spoke positively about how the organizational structure could help them reach their vision. Further, the participants revelled in the freedom the organizational structure granted, and they felt respected and eager to operate as high performing individuals. The second finding concentrated on leadership attributes in a self-managing organizational structure, where participants showed a firm understanding of what needs to be done inside the organization to move the company closer to reaching its vision. The third finding highlighted success strategies for working in a respectful, diverse workplace. Throughout the methods, the participants were supportive of the organizational model, showed an open mindset, and actively made recommendations that could cause positive changes to the Imaginea self-managing ecosystem.

Five conclusions were established through a comparative analysis of the relevant literature together with the inquiry findings. The first conclusion reaffirmed the first finding that participants are supportive of the self-managing organizational structure and recognized that it would help them reach the company's vision. The second conclusion discussed how participants held an open mindset, a willingness to learn, and how the organizational structure allowed them to follow their passions. Further, the participants identified a few areas for improvement, including increasing the opportunities to collaborate and gaining a deeper understanding of the decision-making process. It the second conclusion, the misuse of the term flat organization was also discussed and compared to the relevant literature.

In the third conclusion, it was determined that participants revere the role flexibility that had been granted. In addition to the appreciation of role freedom, participants expressed a desire to understand fellow teammates' functions and experience better. Further, in the fourth conclusion, participants showed a firm understanding of what needs to be done inside the organization to move the company closer to reaching its vision. In addition, there is an opportunity to continue to develop team member's contribution mindset by gaining a deeper understanding of shared leadership attributes. In regards to shared leadership, it was identified that the term flat organization created unnecessary confusion over hierarchy. The fifth conclusion established that team members showed appreciation and gratitude for embracing a diverse workplace, while also determining that appropriate tools and skills to enhance collaboration and maximize their collective wisdom were required.

Five recommendations for action emerged from the findings and conclusions. These recommendations were offered to Imaginea for their consideration to reaffirm and strengthen a culture committed to a self-managing organizational structure. The first recommendation invited Imaginea to gain a deeper understanding of self-management on a corporate and individual level, by removing any association to the term flat organization and understanding naturally dynamic hierarchies of influence. The second recommendation focused on the self-managed team and invited Imaginea to take time to educate, learn, and adopt what works to maximize Imaginea's collective wisdom. Further, it was recommended that Imaginea appoint a person, familiar with self-management, dedicated to tending to their ecosystem. Additional tactical suggestions were offered to further enhance the team dynamic and provide role clarity. The third recommendation suggested that success stories be institutionalized as a way of role modelling for others to learn the same mindset and behaviour. The forth recommendation focused on the onboarding process, offering both tactical suggestions and strategic direction to help employees enter a merge lane when arriving at Imaginea. Through the literature review, it was discovered that a great amount of support and training are required to implement a self-managing system (Chaneski, 1999; Laloux, 2014; Reichard & Johnson, 2011). Thus, the final recommendation asked Imaginea to commit to self-development and, further, to learn the art of feedforward.

The recommendations offered to Imaginea provide suggestions that would enhance the organizational structure. The implementation of the recommendations would require dedicated resources and time. In addition, for the continued success of this inquiry project, team members would have to take an active role in effecting positive change. If the opportunity presents itself, the next step for this project is to review the results of the study with the Imaginea team. Further, this inquiry project will be made available to all Imaginea team members.

Looking ahead, there is opportunity to explore each of the conclusions in greater depth. Focusing on the topics of the self-managing team and capitalizing on diversity, together with exploring, adopting, and adapting onboarding best practices from existing self-managing companies, would allow Imaginea to not only continue to strengthen their commitment to the organizational model, but would also begin to maximize it. As an outside researcher, I am excited about Imaginea's possibilities for the future, and I look forward to continuing to watch Imaginea evolve.

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Chapter One: Focus and Framing

Imaginea Energy (Imaginea) is a business with a vision to "create an energy industry that is better for the planet, and for people, and for profits" (Imaginea, 2016, para. 1). Imaginea was formed in November 2013, by CEO Suzanne West as a result of her commitment to making positive changes in the energy industry. By March 2014, Suzanne was successful in raising $300 million in equity financing, and in April 2014, a company started to form. Imaginea employed 33 people in the Calgary, Alberta, office and eight individuals in the Brooks, Alberta, office at the time of the inquiry. The company produced just over 5,000 barrels per day of conventional oil and gas production.

Imaginea not only aspires to change the energy industry by transitioning from fossil fuels to renewable energy and clean and green[1] hydrocarbons; it is also reimaging the traditional oil and gas top-down organizational structure. Imaginea is aligning and refining its organizational model to be more responsive, adaptive, and agile by adopting a self-managing structure. In addition, Imaginea embraces a concept called "extreme collaboration" (West, 2016, para. 1), in which collaboration is more than desired—it is actively sought after. The organization endeavours to collaborate on solutions both inside and outside its company walls, with the realization that the more it sees, the more it appreciates, the more it learns, the more ideas will be generated collectively (para. 5). The self-managing structure allows the space to tap into the dispersed knowledge of its team members through collaboration, where creativity and innovation emerges.

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[1] Green hydrocarbon refers to a hydrocarbon that is produced with no emissions, no pollution, and no fresh water use. (www.imagineaenergy.com)

Imaginea not only has structured its organization to allow for complex problem solving, it has added a triple bottom line formula by embracing a positive, abundance philosophy that balances the value of planet and people and profits in harmony. Everything that Imaginea does is with the intention to one day produce hydrocarbons "without emissions, without pollution, and without the use of fresh water" (Imaginea, n.d., para. 1).

Recognizing that change was needed in the oil and gas industry, I was extremely intrigued by Imaginea's mission and vision and curious about their organizational model. My role with Imaginea was that of an inquirer. Stringer (2014) stated that one will "not discover knowledge by watching nature do its thing from behind a one-way mirror; rather it is literally created by the interaction of inquirers with the construct into which they have inquired" (p. xi). In addition, to be effective, the process was participatory; I sought to establish a common unity of purpose and perspective by working with my sponsor and stakeholders to build an understanding of each other's experiences to create truly effective outcomes (p. xxi). As an outside researcher, I became a facilitator who "acts as a catalyst to assist the stakeholders to define their problems clearly and to monitor and support their activity as they work toward effective resolution of the issues that provide the focus of their investigations" (p. 20).

My inquiry question was: How might a dialogic process help Imaginea Energy strengthen its commitment to a self-managing organizational model? The following sub questions assisted with the inquiry:

1. What are the stories told by Imaginea employees about their previous experiences with self-management?
2. What are the hopes and opportunities identified by the employees of Imaginea for the organization's full transition to a self-managing organizational structure?

3. How might a self-managing organizational structure help Imaginea be successful in a VUCA (volatile, uncertain, complex, ambiguous) environment?
4. What conditions does Imaginea currently have in place that foster and support a self-managing system that contributes both to personal well-being and to the achievement of collective objectives?
5. What are the stories told by the Imaginea employees that show widespread distribution of authority where employees are empowered to take a leadership role?
6. Among the distinctive processes and practices to Imaginea Energy, which ones are important to continue developing in an effort to enhance a self-managing organizational structure?

Significance of the Inquiry

The past few decades have been challenging for many industries in Canada. Organizations have been disrupted by technology, by globalization, and by the natural progression of consumer demands. Yet, until recently, the energy sector mostly escaped the pressures that have forced so many companies to adapt or wither away. The rapid decline in commodity prices in 2014 was a wake-up call for the oil and gas industry. Paradoxically, this crisis offered an opportunity for transformation in the oil and gas business—for a new way of thinking. Imaginea is not only embracing a new way of thinking; it is motivated by a purpose of building "an energy industry that's better for the planet, and for people, and for profits" (Imaginea, 2016, para. 1). Through this vision, the company's self-managing model was identified as the optimum structure to maximize joyfulness, engagement, teamwork, and results (Imaginea, 2014, Slide 46). By pursuing this inquiry, my hope was to highlight the importance of Imaginea's work, through which commitment to a self-managing organizational structure has the

ability to amplify creativity and innovation. The inquiry intention was to create space for discussion and dialogue around the organizational model, resulting in heightened awareness of the benefits of a self-managing structure. By listening to prevailing narratives, stories, and conversations through which people make meaning, perspectives change, changing the conversation that shape everyday thinking and behaviour (Bushe & Marshak, 2015).

As a consequence of the company's relatively new status, I considered all team members to be stakeholders in the inquiry. Stringer (2014) stated, "Change is an intended outcome of action research; not the revolutionary changes envisioned by radical social theorists or political activists but more subtle transformations brought about by the development of new programs or modifications to existing procedures" (p. 59). By focusing on Imaginea's culture and identifying what was working well inside the organization, my goal was to understand the system structure and not to impose but to stimulate people to take ownership of the organizational model.

In my initial conversations with team members prior to the research, employees identified the need for closer scrutiny of their self-managing system. Through their years in the oil and gas industry, team members had worked in top-down organizational structures and continued to hold onto mental models of how organizations are supposed to work. These deeply held internal images of how organizations are supposed to work may have been limiting them to familiar ways of thinking and acting (Senge, 2006, p. 163). The self-managing organizational model is a new way of participating in a company's future. Identifying efficiencies, benefits, and opportunities in the Imaginea self-managing system was used to promote ownership of the organizational structure. This ownership and acceptance would allow them more space to create, innovate, and practice extreme collaboration, where their complex problems can be better solved as a result of the collective wisdom of not only the Imaginea team, but also the collective intelligence of

anyone brave enough to join them. Inviting team members to realize the full potential of a self-managing system has become a high priority for the CEO and where Imaginea was open to taking an action research approach to aid with the evolution of the organization.

Organizational Context

Imaginea is a small, Canadian, privately funded energy company that produces over 5,000 barrels per day of conventional crude oil and natural gas in South Central Alberta. Imaginea separates itself from other companies in oil and gas industry by focusing on sustainability and community responsibility. The Canadian economy is significantly impacted and reliant on the production, transportation, and export of fossil fuels. However, the growing polarization between the oil and gas industry and the general public is building in regards to climate change. The oil and gas industry needs to recognize that its new competitors are not fellow oil and gas producers, but from new energy systems powered by renewable energy sources.

Imaginea acknowledges that the world is changing, and it is being proactive and strategic in how it navigates the inevitable changes that are going to be imposed on the industry both as a result of regulations and consumer influence. Imaginea is an outlier in in the oil and gas industry, in that it values planet, people, and profit equally. Imaginea is striving to create a clean hydrocarbon, one that will be produced without emissions, without pollution, and without the use of fresh water—a hydrocarbon that will be used to build recyclable products and filling a necessary role in a new ecosystem that is inclusive with renewable energy (i.e., solar, wind, hydro, and geothermal) (Imaginea, n.d., para. 1).

Imaginea is venturing into unchartered territory and requires an organizational structure that is adaptable while capable of unleashing and promoting its team members' ability to be

nimble, creative, and innovative. The Imaginea team believes there are answers to the world's toughest questions and biggest challenges and looks to the ingenuity of Mother Nature, in the innovation of technology, and in the minds of as many people as possible for direction (Imagine, 2014, Slide 7). At Imaginea, their organizational model looks to Mother Nature as a template to show them how to create, grow, adapt, communicate, and thrive in complex interactions. The model recognizes that nature always seeks balance and harmony; it is wildly adaptive, dynamic, and constantly communicating, and it is non-judgmental, diverse, and allows things to happen naturally (Slide 7). Through everyday interactions with each other, use of resources, and responsiveness, the organization is intended to function like a natural organism.

West referenced biomimicry when she described the organizational workings. The Biomimicry Institute defined biomimicry "as an approach to innovation that seeks sustainable solutions to human challenges by emulating nature's time-tested patterns and strategies" (Biomimicry Institute, n.d., para. 1). Imaginea's 45 team members are organized into four *tribes* that represent, Air, Water, Earth, and Fire (Imaginea, 2014, Slide 10). Imaginea operates without hierarchy, where they are shifting the paradigm from the mind-set that "you work for a boss" to the mindset that "you work for and with your teammates" (Slide 46). The intention is that when self-management is functioning well, it eliminates the need for middle management, as there is no requirement to be constantly micromanaged and told what to do, when to do it, and how to do it (S. West, personal communication[2], November 3, 2016).

For Imaginea's organizational model to work, shared assumptions are used in an effort to establish a consistent level of trust in how team members interact, allowing for honest, open, and

[2] All personal communications in this report are used with permission.

transparent collaboration. In addition, through the hiring process, Imaginea seeks to recruit people who are creative, skilled, and do not need to be managed.

The oil and gas industry is faced with some of the toughest challenges and decisions that it has seen in a generation, in which the industry itself is undergoing a structural change. Organizations are requiring leadership skills at all levels in the company in order to align strategy, structure, and people to not only weather this current storm, but to also ensure a sustainable business future. Imaginea has embraced the concept of extreme collaboration in an effort to turn the industry's challenges into opportunities and have adopted an organizational model that, if implemented successfully, has proven to enhance productivity, economic prosperity, and human happiness. Imaginea has taken this challenge head on by defining its purpose and choosing to be part of the solution.

Systems Analysis of the Inquiry

Imaginea is operating in a complex, dynamic, emerging, and non-linear space that is intertwined with many mini systems that interact with each other, yet ultimately aim to move in the same direction of wanting a brighter future. West (2014) stated that "in a world where problems are complex, the need for courage and commitment to make a difference is even greater" (para. 1). Further, Scharmer (2009) stated, "The essence of systems thinking is to help people close the feedback loop between the enactment of systems on a behavioral level and its invisible source of awareness and thought" (Chapter 3, "The Split Between," para. 4).

The mini systems that are operating around Imaginea are those that represent the three paradigms encompassed in their vision of creating an energy industry that is better for the planet, and for people, and for profits (see Figure 1). Each of these systems reaches both into the core of Imaginea, while also extending outside of the walls of the company into an uncertain world.

Major demands and constrains on the Imaginea system emanate from outside the system's boundaries. Imaginea pushes back on these external forces, creating a ripple effect when it introduces its purpose to its service providers, customers, and colleagues in the industry. Imaginea seeks out partners that share the same set of values and vision for a better future in the energy space. In an effort to engage with external forces, Imaginea has opened its door with an invitation to all to actively participate in dialog and discussion on ways to create a better energy future.

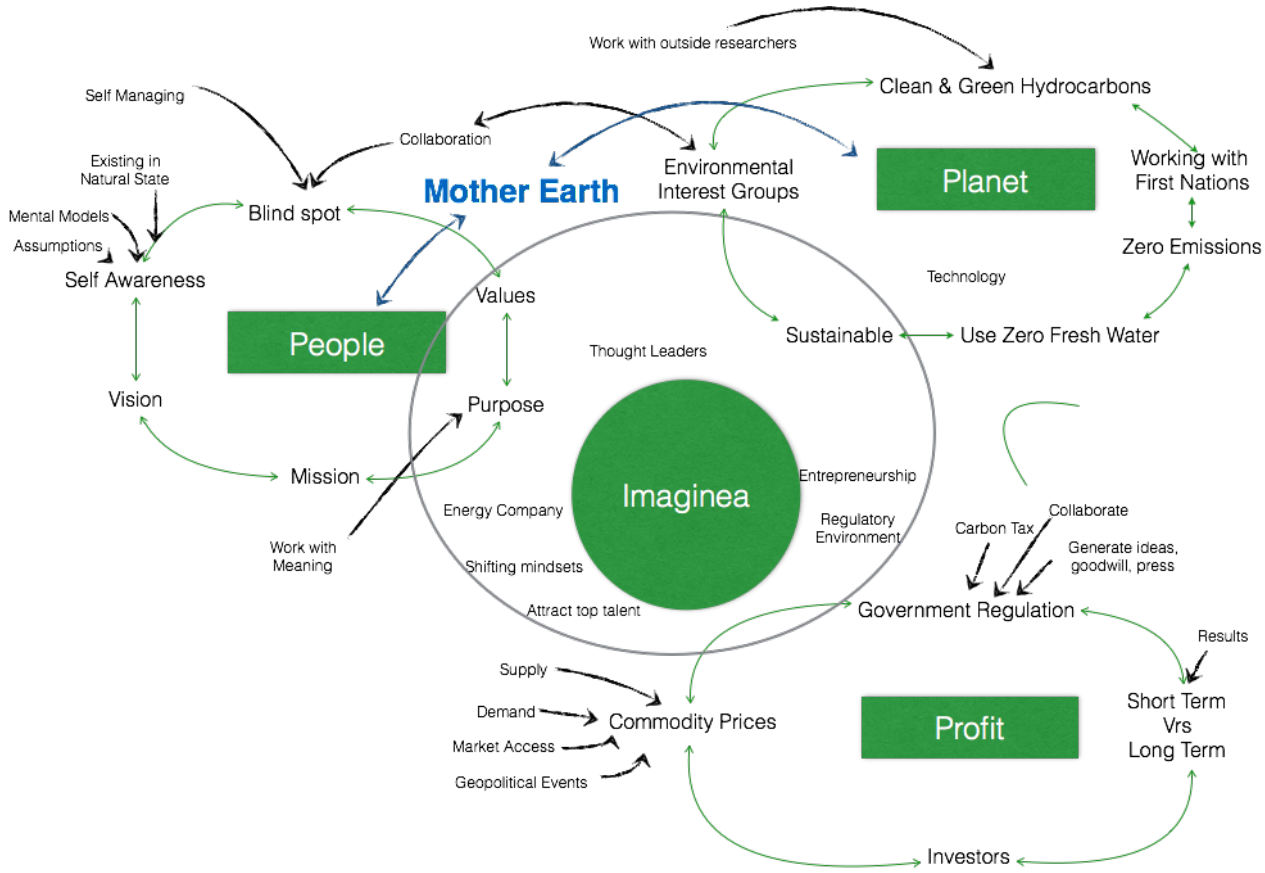

Figure 1. Self-managing structure and the positive connections with all the mini systems that exist within and around Imaginea.

These mini systems, both external and internal to Imaginea, influence its culture and way of operating. The mini systems establish the behaviours not only of the competitive environment that Imaginea finds its self in (i.e., profit), but also creates opportunities in the natural environment (i.e., planet) that helps them to fulfill their purpose. Because Imaginea is able to see the various systems, it has begun to decipher the significant changes in the oil and gas industry where it sees a future that can be different, and Imaginea is moving toward it.

One of the mini systems that influence Imaginea is revolving around "planet." Imaginea (n.d.) is striving to create a hydrocarbon that is clean and green by eliminating the use of fresh water, reducing emissions to zero, and incorporating the use of renewable and sustainable energy sources where appropriate in their process. Many factors are influencing Imaginea's ability to reach this goal, including technological advancements, collaborating with academic and research institutes, engaging with environmental groups, listening and working with First Nations, and educating its own employees on living a sustainable life.

During the 2016 Liberal convention, Peter Tertzakian explained to the delegates that energy, all energy sources including renewable sources, have historically been problematic to the environment. Imaginea has viewed this as an opportunity to innovate and form mutually beneficial partnerships where Imaginea may be able to gain social license to operate. Although gaining social licence is not Imaginea's outright mandate, it may be obtained as a result of Imaginea's actions. This spills over into one of the other mini systems that influence Imaginea, which is profit.

If Imaginea's business concept and innovation engine fails, then it fails period. McDonough and Braungart (2013) emphasized that a company "succeeds when it celebrates economic growth, which in turn grows ecological and social revenue" (p. 189). Imaginea sees

itself as inhabiting a space somewhere between environmentalist and capitalist and believes it can exist in harmony. Imaginea is a privately funded company, where profits are required to be amongst the top priorities of the enterprise. Profits are necessary to support activities inside the organization as well as satisfy its investors. Imaginea not only has to compete for investment within the oil and gas space, its purpose of protecting the planet and valuing its people in addition to making a profit adds increased complexity when competing with those on the treadmill of instant gratification (i.e., short-term decision making). However, in an effort to satisfy investors, profits need to be competitive. Where short-term economics have been the go-to strategy for many of Imaginea's competitors in the oil and gas financial space, Imaginea has been able to let go of the notion that cause and effect are close in time and space (Senge, 2006, p. 63). Therefore, Imaginea is able to invest in longer-term solutions, where their operating costs will be lower than their competitors in the future. Although, on the surface, having a long-term strategy seems like a common sense plan, Imaginea's financial backers look to Imaginea to compete with the short-term financial returns of its competitors (G. Hart, personal communication, October 12, 2016). With low oil prices and uncertainty being created in the market, the phenomenon of faster returns and more short-term decisions is being magnified. This adds an additional layer of complexity to the organization and may affect the decision making and behaviours of team members.

Although investors would be considered when decisions are being made, government regulation and commodity prices also have an impact on profit. When commodity prices decrease or taxes increase, fewer funds are available to enhance operations, which results in delayed projects or outright cancellation. In addition, the uncertainty that is created through policy changes and changes in tax structures that are not shared by competitive jurisdictions

leads investment dollars, which are required to innovate, to move elsewhere. As investment dollars bleed from Alberta, while new regulations and tax changes affect Imaginea's bottom line, the company has chosen to place a high value on its people by developing them in a way that brings out inner strengths. The company's commitment to learning in support of both the organization's goals and personal goals allows Imaginea team members to interact with the other systems (i.e., planet and profit, see Figure 1) in positive ways.

Imaginea encourages diversity, agility, and disruptive thinking. They are challenging the way business has been done in the energy industry. Imaginea strives to adopt a systems thinking, problem-solving model where it has been able to identify negative feedback loops and are intervening continuously in an effort to fight for a better future. Imaginea has recognized that it needs the support of others to realize their vision. Placing a high value on people and their personal development allows Imaginea's team members to not only become aware of their own potential, but is also giving them tools to effectively communicate across boundaries in an effort to increase the speed of knowledge gained. This will, in turn, plant seeds for change, creating a ripple effect across the various industries.

Imaginea has clearly defined its vision, mission, values, purpose, and assumptions, yet the self-managing system was identified by various stakeholders as not being complete. Scharmer (2009) spoke about a "blind spot", where in every organization, a larger social system, is operating, one that is much larger than the eye can see (Forward section, para. 7). Senge (2006) also identified a blindness that exists in us that contributes to the obstacles of compensating feedback (p. 60). Because "the ways in which the agents in a system connect and relate to one another is critical to the survival of the system" (Hass, 2009, p. 23), focusing on the self-managing structure and the positive connections with all the mini systems that exist within

and around Imaginea will help identify patterns that inform the behaviours. “It is from these connections that the patterns are formed and the feedback disseminated. The relationships between the agents are generally more important than the agents themselves” (p. 23).

Chapter Summary

The significance, the organizational context, and the systems analysis of the inquiry have been provided in this chapter. Imaginea is venturing into unchartered territory in regards to the oil and gas industry by challenging existing norms and encouraging disruptive thinking. Imaginea has adopted a new organizational structure, with the thought that it will be the most efficient and effective organizational structure, which will allow them to not only reach their vision, but to also realize it in the quickest way possible. The literature on the self-managing organizational structure and the leverage points within the system that contribute to its success will be examined in Chapter Two.

Chapter Two: Literature Review

To more fully understand the inquiry, this chapter is dedicated to a literature review that helped in defining the question: How might a dialogic process help Imaginea Energy strengthen its commitment to a self-managing organization? Six sub-questions assisted with developing the research: (a) What are the stories told by Imaginea employees about their previous experiences with self-management; (b) What are the hopes and opportunities identified by the employees of Imaginea for the organizations full transition to a self-managing organizational structure; (c) How might a self-managing structure help the organization be successful in a VUCA (volatile, uncertain, complex, ambiguous) environment; (d) What conditions does Imaginea currently have in place that foster and support a self-managing system that contributes both to personal well-being and to the achievement of collective objectives; (e) What are the stories told by the Imaginea employees that show widespread distribution of authority where employees are empowered to take a leadership role; and (e) Among the distinctive processes and practices to Imaginea Energy, which ones are important to continue developing in an effort to enhance a self-managing organizational structure?

In an attempt to address the inquiry question, it was necessary to understand the organizational philosophy and principles that define a self-managing organizational structure. In addition to understanding the philosophy of a self-managing organization, defining the role of leadership and how it can be effectively distributed amongst a self-managing team and the role of formal leadership in a self-managing organization was required. The last topic addressed diversity in the workplace.

Understanding Self-Managing Organizations

Self-management is an alternative structure to the traditional, hierarchical method of organizing that is seen most often in modern organizations. Most organizational charts used today share the same structure: a pyramid with a few rectangles at the top and many at the bottom. In recent years, new management concepts have broken from the traditional structure: Holacracy, Teal Organizations, Responsive Organizations, Adaptive Organizations, and Self-Managing Organizations to rid their companies of the management pyramid and deal with the disconnect between structure and empowerment. Understanding the self-managing organizational structure will allow for vocabulary recognition, appreciation for the complexity, and awareness of the systems design behind the organizational structure.

Defining self-managing organizations: David Rose (2014) summed it up dramatically: "Any company designed for success in the 20th century is doomed to failure in the 21st" (p. xix).The notion of self-management has been around since Eric Trist and Ken Bamforth's (1951) study of self-regulated coal miners in the 1950s. However, the disruption caused by technology, globalization, and the natural progression of consumer demands "calls for a different solution to building new business, to improve rates of success and to solving the challenges that lie ahead" (Ismail, 2014, Introduction, Doubling down section, para. 8). Self-managing organizations are co-arising under many names. However, the philosophy of the various organizational structures is rooted in a "fundamental mind-shift in the way we view human organizations, management, and organizational strategy" (Morning Start Self-Management Institute, n.d., para. 9). In this literature review, I will examine some required basics of the organizational structure and the team characteristics that contribute to the successful implementation, while addressing some barriers to maximizing the organizational structure.

"People who are new to the idea of self-management sometimes mistakenly assume that it simply means taking the hierarchy out of an organization and running everything democratically based on consensus" (Laloux, 2014b, Part 2, Section 2.3, Misperception 1, para. 1). Like traditional organizational models, self-managing structures have their own set of processes and practices that guide how decisions are made, roles are defined and distributed, and teams are set up (Laloux, 2014b; Robertson, 2015).

Hackman (2009) defined self-managing organizations in terms of how authority is determined about how work is executed, monitored, managed, and designed (p. 763). He stated that members of a self-managing unit were responsible not only for executing tasks, but also for monitoring and managing their own performance (p. 765). Robertson (2015) described the Holacracy model as one in which roles were regularly updated and defined around the work, authority was distributed to teams and decisions made locally, and everyone is bound by the same rules. Laloux (2014b) presented organizations as living entities, with strategy emerging organically, decisions emerging from the company's purpose, and constant sensing of what is needed when he described his "Teal" organizational model. Bornath and Wegst (2015) suggested that Laloux's Teal organizational model, which is based on wholeness, evolutionary purpose, and self-management, as anchored in Holarctic practice. One element consistent amongst the various interpretations of self-managing organizational structures is the concept of decentralization of decision making.

Decentralization of the decision-making process highlights the importance of reviewing the self-managed team. Self-managed teams are highly empowered (Gordon, 2002) and are responsible for managing and monitoring their own processes and executing tasks. They receive authority to control their work environment and their team's functions and are granted

tremendous flexibility over their decision-making process. Typically, teams share decision authority jointly rather than having a centralized decision structure, where one person makes all the decisions, or a decentralized decision structure, where team members make independent decisions. This should effectively lead to increased productivity and focus on common goals (Druskat & Wheeler, 2003; Moe, Dingsuyr, & Dyba, 2009; Rapp, Gilson, Mathieu, & Ruddy, 2016). To be able to achieve decentralization and their goals, the teams have relevant information, resources, and skills available (ter Horst et al., 2003) and receive performance feedback (Wall, Kemp, Jackson, & Clegg, 1986). Edmondson (1999) agreed with seeking feedback as critical to the effectiveness of a self-managing team. He also added that an ongoing process of reflection and action characterized by asking questions, experimenting, reflecting on results, and discussing errors or unexpected outcomes or actions were required for the continuous learning that is evident in well-designed self-managed teams (p. 353). This continuous learning is the responsibility of the team rather than higher level managers (van der Vegt, Bunderson, & Kuipers, 2010, p. 1172).

Hackman (2009) explained five behaviours that were present in a self-managing team, which may be absent from a manager-led unit. The traits consisted of:

> (1) People take personal responsibility for the outcomes of their work and show in their behaviour that they feel personally accountable for the results. (2) People monitor their performance continuously, actively seeking data and feedback to learn how well they are accomplishing their tasks. (3) People manage their performance, taking corrective action on their own initiative to improve their performance. (4) When people do not have what they need to perform well, they actively seek from the organization the guidance, help, or resources they need for excellent performance and they do so assertively and

> constructively. (5) People take initiatives to help people in other areas improve their performance, thereby strengthening the policies and performance of the organization as a whole. (pp. 766–769)

Hackman continued to discuss the traits and stated that self-managing units are found at both ends of the effectiveness spectrum. Poorly designed teams or ones that are performing independently of the team are easily outperformed by smoothly functioning traditional units. On the other hand, "self-managing teams that function well can achieve a level of synergy and agility that never could be preprogrammed by organization planners or enforced by external managers" (p. 772).

For further clarification on the decision-making process: "Self-managing teams are different from self-directed teams. Self-managing teams work toward goals that are set for them by outside leadership, whereas self-directed teams work toward a common goal that they define" (Lumen Learning, n.d., Self-Managing Teams, Key Takeaway section, para. 3).

Although this literature was dedicated to defining a self-managed organization, identifying barriers to implementing the structure may assist with understanding challenges that Imaginea could face when maximizing their organizational structure. Laloux (2014b) stated the necessary conditions for implementing his Teal organizational structure were top leadership and ownership. Further, top leadership, ownership, and possibly having a critical mass of leaders operating at a higher level of consciousness in addition to full buy-in of the model are critical to a successful implementation (Part 3, Section 3.1, Necessary Conditions, para. 1).

When top leaders and ownership are bought into the organizational structure, the next level to review is the self-managing team. A self-managing team's performance depends on not only the team's competence in managing and executing its work, but also the organizational

context management provides (Moe et al., 2009, p. 21). More specifically Moe et al. (2009) researched the barriers that prevented successful implementation of self-managing teams. They concluded that failure to genuinely commit to the team by putting individual goals above team goals; failure to learn due to low team autonomy; and individual leadership as a result of team members not changing the individual, decentralized decision-making process were the main barriers to effective self-managed teams (p. 22). In addition, Hackman (2009) stated, "Effective self-management is not possible unless someone exercises authority to set the direction for the performing unit" (p. 773). Chaneski (1999) noted that the self-managed teams that achieved the highest degrees of success received a great deal of training before implementation (p. 52).

Throughout the literature, a consistent definition of a self-managing organization was not found. The interpretation of the term self-management varied, which was seen in how self-managing teams get formed (e.g., self-managed, self-directed, self-governing, etc.). Because of this diversity, semantic differences exist, and different labels are used to refer to the same concept. I would argue that this lack of clarity may create confusion and cause an additional barrier to implementing a self-managing system by not having a precise definition of what concept defines the organization. Reviewing the self-managing organizational structure, together with defining an effective self-managing team and identifying possible barriers to implementing a self-managing organizational structure assisted with identifying opportunities to enhance Imaginea's organizational structure.

Defining leadership in self-managing organizations: "The competitive advantage for teams and organizations wanting to succeed in the twenty-first century is to lead in ways that optimize the collective intelligence and creativity alive in any human relationship system" (Rod & Fridjhon, 2016, p. xi). Jackson and Parry (2011) concurred by arguing that "leadership is an

intangible asset that must be cultivated in order to gain a rare and valuable source of competitive advantage" (p. 9). As leadership is distributed throughout the Imaginea organization, reviewing academic literature addressing distributed and shared leadership in addition to the role of formal leadership in self-managing organizational structures will provide wisdom, clarity and perhaps a framework that will help stakeholders analyze their current situation and desires for the future.

Shared leadership and team effectiveness: This literature review is intended to broaden the perspective on shared leadership and provide researched results that would support heightened team effectiveness as a result of shared leadership. Three identified factors that impacted team effectiveness when leadership was shared were based on the composition of the team and its members' personality traits, the time the team spent together, and the complexity of the task at hand.

Stewart, Courtright, and Manz (2011) stated that the use of self-managed teams in organizations necessitates teams to self-lead through distributed leadership. Wang, Waldman, and Zhang (2014) defined shared leadership "in terms of an emergent team property of mutual influence and shared responsibility among team members, whereby they lead each other toward goal achievement" (p. 181). Hoch (2012) stated that "understanding how organizations can enhance their own innovation is crucial for the organization's competitiveness and survival" (p. 159). Small and Rentsch (2010) addressed the theory that "shared leadership is proposed to relate positively to team performance due to increased information sharing and participation among team members" (p. 204). Hoch suggested "that shared leadership had a positive association with innovation" (p. 159).

One factor supported throughout the literature for effective shared leadership was the composition of the team. Hoch (2012) stressed that the "degree to which team members engaged

in shared leadership maybe impacted by personality factors that influence preferences for loyalty, transparency, and fairness rather than promoting one's self-interest" (p. 160). Small and Rentsch (2010) added that:

> A willingness to cooperate and work interdependently with others and to influence and be influenced by other team members is likely to be associated with engaging in shared leadership. Thus, member's disposition and emergent team process are likely predictors of shared leadership. (p. 205)

In addition to employing the right people to achieve team effectiveness, Small and Rentsch (2010) explored the possibility that shared leadership may take time to develop. Further, that intragroup trust is a generalized expectation that other team members are honest, competent, and benevolent where these expectations manifest themselves as a willingness to engage in risk-taking (p. 205). Wang et al. (2014) dug deeper by exploring the new leadership literature regarding the cumulative overall shared leadership that is built over time where respective team members are viewed as leaders in a generic sense (p. 184). The time required to establish team effectiveness was based around the team creating a level of trust (Hoch, 2012; Small& Rentsch, 2010; Wang et al., 2014). In addition to trust, Small and Rentsch identified that shared leadership requires team members to have an accurate understanding of each other's skill and abilities and therefore are more likely to be displayed by experienced teams (p. 209).

In addition to personality traits and time required to establish effective teams, the nature of the work that is pursued by a group or organization may be relevant to the relationship between shared leadership and team effectiveness. Morgeson, DeRue, and Karam (as cited in Wang et al., 2014, p. 185) stressed that when a team faces much complexity, as well as associated uncertainty in achieving goals, there may be heightened demands for more than one

individual to play the leader role. Wang et al. (2014) concluded that "the effects of shared leadership are more strongly observed when the work of the teams is more complex" (p. 193).

The initial studies referred to in this literature review all showed a positive relationship between shared leadership and team effectiveness. However, as part of the leadership involved in self-managing teams, team members are required to not only hold team members accountable for results, but also need to hold team members accountable for behaviours. "The underlying rationale for caring about interpersonal behaviours on the job is of course, that they contribute to or work against achievements. Group cohesiveness and commitment contribute importantly to effectiveness" (deLeon, 2001, p. 9). Further, Bunderson and Boumgarden (2010) suggested,

> Team structure can promote an environment of psychological safety within the self-managed group. Clarity around roles, procedures and priorities, and authority relations makes members' relations and interactions more predictable and eliminates uncertainty in those relations, which sets an important foundation for intragroup trust. (p. 613)

In the literature above, it was identified that the studies were limited to the relatively moderate number of studies available on the topic. Wang et al. (2014) suggested a further study on typical configurations of shared leadership and a better understanding of the co-existence of more than one type of leadership within a team (p. 192).

Role of formal leadership in a self-managing organization: Kouzes and Posner (2012) suggested,

> When sailing through the turbulent seas of change and uncertainty, crew members need a vision of the destination that lies beyond the horizon; they also need to understand the principles by which they navigate their course. If either of these is absent, the journey is likely to end with crew lost at sea. (p. 49)

This perspective on leadership contrasts with a later idea that addresses the complexity of leading in a self-managing organizational structure. In their book *Collective Genius*, Hill, Brandeau, Truelove, and Lineback (2014) wrote:

> If you want to produce something truly new and useful, you cannot know—by definition—exactly where to go. That is why leading innovation is not—cannot be—about being a visionary. The last thing you want is a team that defers to you to set a course. . . . If your goal is innovation, then your role must instead be to create an environment—setting a context, an organization—where people are willing and able to do the hard work of innovation themselves: to collaborate, learn through trial and error, and make integrated decisions. (Chapter 3, Lessons from a different kind of leader section, para. 11)

The different perspectives demonstrate the complexity of leading in a self-managing organizational structure. Further, Laloux (2014b) discussed organizations that implemented an organizational structure that abolished all hierarchy, gave everyone the exact power, and made all decisions by consensus. He noted that in hindsight, these extreme forms of egalitarian organizations have not been successful or meaningful (Part 1, Section 1.1, Green Organizations, para. 1).

Previously, the literature addressed distributed leadership in self-managed work teams; the fact that an organization has adopted self-managing work teams does not necessarily mean there is no need for direct management. “Most self-managing groups have a formal leader who is located above the group in the organizational hierarchy” (Cohen, Chang, & Ledford, 1997, p. 276). However, Douglas (2002) stressed the importance of behavioural adjustments on the side of the leader. These adjustments included accepting the new concept of team members

having increased authority, needing unrestricted access to organizational information, and the need to develop a higher leader-to-member exchange (p. 629). Douglas explained this exchange is created through mutual trust, respect, and finally, accepting the fact that the strict control over the team diminishes (p. 629). Moreover, enhanced task feedback, the creation of a shared vision, and encouraging the team to perform beyond expectations are additional crucial duties a leader must fulfil to push self-managing teams into a more self-independent direction (Williams, Parker, & Turner, 2010). Contrasting this to lack of active leadership, coined laissez-faire leadership, which is considered a mainly passive leadership style has been proved to be an ineffective leadership style (Antonakis, Avolio, & Sivasubramaniam, 2003; Weisbord, 2012).

The external leaders provide the link between the broader organization and the self-managed teams, empowering the team and advocating on its behalf. Anderson and Sun (2017, p. 90) added that the external leader of a self-managing team is crucial in facilitating a shared purpose, social support within teams by promoting group cohesiveness, and by encouraging their followers to have a voice. Hackman (2009) added that "because self-managers are not given detailed, step-by-step behavioural prescriptions, it is imperative that they have some clear set of values or aspirations to use in evaluating ways they might proceed" (p. 775).

In summary, leadership both within the self-managed team and the role of formal leadership are critical to the successful implementation of a self-managed system. By reviewing this literature, roles both within the team and external to the team have been explored. Role clarity may contribute to strengthening the commitment to the organizational structure. To further complicate this Jackson and Parry (2011) noted, "Leadership is a phenomenon that everyone has an opinion on but few of us seem to agree exactly on what it really is" (p. 12).

Diversity in the Work Place

A diverse workplace brings new challenges and opportunities. By reviewing the literature on how to maximize collective wisdom, addressing conflict positively and leveraging training can be useful in enhancing both team and organizational success.

Maximizing collective wisdom. By assessing work team diversity, additional perspectives may be gained as to why collective intelligence is free-flowing or hindered as a result of the team dynamics. Understanding what constitutes an effective team could provide insight into team dynamics at Imaginea.

With the ageing workforce, more literature is available on the topic of age diversity and self-managed teams. Cox et al. (as cited in Hoch, Pearce, & Welzel, 2010, p. 107) argued that age diversity is an important predictor variable with regards to shared leadership. Mixed results have been reported on age diversity on team performance (Hoch et al., 2010, p. 107). Hoch et al. (2010, p. 112) found that "age diversity compensated for low levels of shared leadership in predicting team performance" and concluded that shared leadership filled a "leadership vacuum" in conditions of low age diversity and team experience. Further, they offered that "initial evidence that the shared leadership and team performance relationship are more complicated than simply a direct effects relationship" (p. 113). Hoch et al.'s research was limited by the use of cross-sectional data, limited sample size, and limited age range studied (p. 112).

Other reviewed literature determined a positive relationship between various contexts and team effectiveness. Knippenberg, Ginkel, and Homan (2013) suggested that the concept of a shared positive diversity mindset, meaning team members espouse a belief in the value of diversity and building a climate free of discrimination, can play an essential moderating role in

the effects of diversity on team performance (p. 185), thus negating adverse consequences that diversity caused. It was also noted by Knippenberg et al. that:

> Accurate mindsets are more likely to develop through a process of team reflection where . . . research on team reflectivity and team learning has shown that unless teams are coached or guided in some way, teams may learn less from their experience that they could in part because reflection is not a process that many teams perform spontaneously. (p. 189)

In conclusion, the reviewed literature explored how diversity can enhance as well as disrupt team performance in order to maximize collective wisdom in a self-managing organization. Having ongoing conversations between team members to understand each other's diversity mindset may negate adverse consequences caused by working in a diverse workplace. Knippenberg et al. (2013) suggested mindsets be explored through "promotion versus prevention focused goals, exploration versus exploitation-focus goals, and team-specific procedural knowledge of diversity" (p. 186). The literature provided perspectives that allowed for possible recognition of "blind spots" within the organization. Scharmer (2009) "[revealed] an inner place from which we operate (our invisible realm, in which our sources of attention and intention reside and from which they operate)" (Introduction, The Archimedean Point section, para. 5).

Addressing conflict positively*:* "Equilibrium is a precursor to death. When a living system is in a state of equilibrium, it is less responsive to changes occurring around it. This places it at maximum risk" (Burke, 2009, p. 755). The integration of diverse viewpoints forms an essential part of complex problem solving in organizations. The literature reviewed differentiated between task conflict and relationship conflict. Task conflict, which entails disagreements about the task and derives from team members' "different underlying viewpoints, ideas, and opinions,

is theoretically proposed to serve a positive function in groups by causing individuals to carefully process and integrate the diversity of information at hand" (Hill, 2011, p. 2). Relationship conflict is a more plainly dysfunctional type of intragroup conflict, which entails "person-centred tension, animosity, and friction between team members" (p. 2). The next section reviews task conflict within the self-managed team.

Self-managing organizational structures assume that interdependent team members are sharing ideas, opinions, and knowledge relevant to organizational issues and collectively proposing a course of action toward addressing the issues. In this type of work, a certain degree of underlying problem-relevant diversity is expected, if not demanded. Senge (2006, p. 230) explained the difference between dialogue and discussion, where he noted that in dialogue, different views are presented as a means of discovering a new view, complex issues are explored, alternate views need to be weighed, and a preferred view selected. Senge also stated, "Contrary to popular myth, great teams are not characterized by an absence of conflict" (p. 232). Moreover, Senge pointed out that "the free flow of conflicting ideas is critical for creative thinking, for discovering new solutions no one individual would have come up to on their own. Conflict becomes in effect part of ongoing dialogue" (p. 232). Although conflict can be constructive, paying attention to factors in other areas that can decrease the frequency of conflict in self-managed teams is beneficial.

Theoretical work was done by Brown, Lawrence, and Robinson (2005), acknowledging that lack of team structure increased the frequency of conflict in self-managing teams. They suggested that conflict within organizations will tend to decrease when agreed-upon territories have been established with clearly defined tasks, allocated responsibilities, and agreed-upon decision-making processes. In addition, reducing the frequency of conflict can be accomplished

by “enhancing task coordination and reducing ambiguity with regard to roles, procedures, guidelines, and schedules. Structure makes clear to each team member who should be doing what as well as how and when they should be doing it” (Bunderson & Boumgarden, 2010, p. 613). It is worthy to note that Bunderson and Boumgarden (2010) tested the assumption that structure and learning are antithetical. They concluded that “in self-managed teams, the structure could create a safe and predictable team environment that fosters a focus on experimental learning and continuous improvement” (p. 620). They also noted limitations in their research, including characteristics of the sample, the design of the study, and the pattern of observed findings. They also concluded that “structure and bureaucracy have become scapegoats for a wide variety of organizational problems which ironically would disappear if organizations and teams simply used structure appropriately” (p. 621).

Knippenberg et al. (2013) also studied team roles in the context of a diversity-performance relationship. They concluded that as tasks become more complex, team members need to know about one another’s expertise, roles, and procedural knowledge about the sequence of actions for effective team performance (p. 185).

In summary, diversity poses complex challenges. However, because diversity can have both negative and positive effects on team performance, reviewing literature that promoted diversity while understanding some of its limitations and moderating factors was helpful. In addition, maximizing the possibilities of a diverse team requires leadership and training.

Leveraging training*:* The literature showed a need for self-development to be an effective leader and spoke to the importance of values. Senge (2006) defined personal mastery as “the discipline of personal growth and learning . . . that goes beyond competence and skills, though it is grounded in competence and skills” (p. 130). He added: “People with high levels of

personal mastery are more committed. They take more initiative. They have a broader and deeper sense of responsibility in their work. They learn faster" (p. 133).

Reichard and Johnson (2011) suggested that one approach to leadership development was to implement leader self-development as an organizational strategy. Further, they stated that "self-development translates into an enhanced ability to solve problems quickly and generate creative ideas that support organizational adaptability and growth" (p. 33). Reichard and Johnson noted that self-development might include self-leadership or self-management qualities (p. 35). Furtner, Baldegger, and Rauthmann (2013) suggested that self-leadership was related to active and effective leadership, and effectively leading oneself could be an essential first step to effectively leading others (p. 436). Furtner et al. further explained three primary strategy dimensions that formed the self-leadership domain. This included a behavioural (i.e., self-goal setting, self-reward, self-punishment, self-observation, self-cueing), motivational (i.e., generation and maintenance of intrinsic motivation), and cognitive (i.e., visualizing successful performance, self-talk, evaluating beliefs and assumption) domains, and all three strategy domains "must work smoothly together to generate effective and productive patterns in an individual" (p. 437).

Carson, Tesluk, and Marrone (2007) found that important antecedents for distributed leadership are an overall supportive team environment, consisting of shared purpose, social support, and voice, and supportive coaching by an external leader (p. 1217). "Developing leader characteristics, such as goal setting, self-regulation, and meta-cognitive skills should be targeted through the organization's training programs" (Reichard & Johnson, 2011, p. 38).

In addition to exploring organizational training, Roy (2016, para. 1) explained that while your thoughts govern your conscious actions, the underlying values directly influence your

unconscious behaviours. Values themselves are known to us as what we feel like doing, what we want to do, and what we dream of doing. Barrett (2010) stated that:

> Values stand at the very core of human decision-making. When we work in an organization whose culture aligns with our personal values, we feel liberated. We are able to bring our full selves to work. We not only bring our energy, our creativity, and our enthusiasm, we also bring our commitment to the well-being of our associates and the success of the organization. (p. 1)

Kouzes and Posner (2012) suggested that "to become a credible leader, you first have to comprehend fully the deeply held beliefs—values, standards, ethics, and ideals—that drive you" (p. 45). Further, Gharajedaghi (2011, p. 103) argued that the extent to which an individual's value image coincides with the shared image of her/his community determines the degree of his/her membership in that community. Conflicting values within a social system also contribute to alienating its members. The level of integration that society will achieve depends on how it dissolves the value conflict among all its diverse membership groups.

Chapter Summary

I conducted this literature review with the intent to understand self-managing organizational structures, the role shared leadership and formal leadership play in the organization, and discovering factors that lead to a respectful, diverse workplace. "While research literature does not provide definitive answers to all issues it does provide information that sometimes has been thoroughly established through rigorous and systematic studies that provide much higher degrees of certainty than gained from other sources" (Stringer, 2014, p. 20). The methods and activities used to conduct this research are described in the next chapter.

Chapter Three: Inquiry Project Approach

This chapter outlines the action research approach and methodology used to explore the inquiry question: How might a dialogic process help Imaginea Energy strengthen its commitment to a self-managing organizational model? Six sub-questions assisted with developing the inquiry: (a) What are the stories told by Imaginea employees about their previous experiences with self-management; (b) What are the hopes and opportunities identified by the employees of Imaginea for the organizations full transition to a self-managing organizational structure; (c) How might a self-managing structure help the organization be successful in a VUCA (volatile, uncertain, complex, ambiguous) environment; (d) What conditions does Imaginea currently have in place that foster and support a self-managing system that contributes both to personal well-being and to the achievement of collective objectives; (e) What are the stories told by the Imaginea employees that show widespread distribution of authority where employees are empowered to take a leadership role; and (f) Among the distinctive processes and practices to Imaginea Energy, which ones are important to continue developing in an effort to enhance a self-managing organizational structure?

The project participants and inquiry methods used, including the data collection methods, study conduct, and data analysis, are also described in this chapter. I close this chapter by addressing potential ethical considerations.

Inquiry Project Methodology

Coghlan and Brannick (2014) explained, “Action researchers take a closer look at what they are doing and act to make things better than they are” (p. 16). The goal of this inquiry was to find out how Imaginea might strengthen stakeholder commitment to its self-managing organizational model, resulting in stakeholder ownership of the structure leading to increased

accountability, concentrated focus on business outcomes, heightened creativity, and innovation. "Buy-in and ownership are opposite concepts. 'Ownership' involves those doing the work developing the ideas, making the decisions and designing and acting on the plans, whereas 'buy-in' involves agreeing to follow practices that have been externally imposed" (Zimmerman et al., 2013, p. 8). Strengthening commitment to the organizational model cannot be imposed. Commitment is a process necessary to achieve a goal that cannot be accomplished without earnest devotion. "Action research acknowledges the limitations of the knowledge and understanding of the expert researcher and takes account of the experience and understanding of those centrally involved in the issues explored—the stakeholders" (Stringer, 2014, p. 37).

Stringer (2014) also explained that action research "provides the means by which stakeholders explore their experiences, gain greater clarity and understanding of events and activities, and use those extended understandings to construct effective solutions to the problems on which the study was focused" (p. 37). In this project, stories were exchanged about experiences, how the stakeholders experienced their situation, and visions shared about the future and creating a positive picture and moving the company towards a stronger commitment to their self-managing organizational structure. This process is called "Action Research Engagement (ARE)" (Rowe, Graf, Agger-Gupta, Piggot-Irvine, & Harris, 2013, p. 20); the model is attached in Appendix A.

In addition to following an action research methodology, I endeavoured to incorporate an appreciative stance. Cooperrider and Whitney (2005, p. 5) described appreciative inquiry as a systematic discovery of what gives "life" to a living system when it is most alive, most effective, and most constructively capable in economic, ecological, and human terms. By inviting the research participants to share positive stories in support of the organizational model, the

objective was to touch the positive core of organizational life and to draw out the human spirit in the organization (Cooperrider, Whitney, & Stavros, 2007, p. 225), thus leading to a more significant commitment to the organizational model. Commitment happens from within and cannot be imposed by external forces. In an effort to create psychological ownership of the self-managing organizational model, highlighting what gives life to the system was of utmost importance. Crafting the journey that could help stakeholders develop an emotional investment in their work, the organization, and its purpose and achievements (Laloux, 2014b, Part 3, Section 3.3, para. 12) by taking an appreciative stance, it helped guide me to show the stakeholders what could be. By combining action research with an appreciative stance, I "engage[d] the more creative and caring features of human interactions, increase[ing] the likelihood of greater ownership and more sustainable outcomes that have an enduring effect on peoples work and community lives" (Stringer, 2014, p. 69). I employed multiple qualitative methods in this inquiry, including a literature review, interviews, and a learning circle then cross triangulated the data to arrive at conclusions.

Project Participants

Imaginea employed 33 people in the Calgary, Alberta, office and eight team members located in Brooks, Alberta, at the time of the inquiry. Due to the small size of the company and the inquiry topic, all team members were considered stakeholders.

Interviews were identified as the first data collection method. The CEO, CFO, and four volunteers were interviewed. The CEO, who was also my sponsor, was selected because she is the founder of the company and the visionary behind bringing a self-managing organizational structure to an oil and gas company. I also invited the CFO. She is one of the original employees and holds a formal leadership role. By interviewing the CEO and CFO, I was able to attain their

view of the company's values, vision, and mission in addition to hearing first-hand how they envisioned Imaginea's future.

Interview invitations were sent out via email to all Imaginea employees, requesting a response by a specific date. Initially, the intention was to interview the CEO, CFO and randomly draw two volunteers from the employee responses. However, the six respondents represented a cross-section of the company, which included the CEO, CFO and four team members. With approval from my academic supervisor, it was decided that a random draw was not required, and all who volunteered were interviewed.

In addition to the interviews, a learning circle had been identified as the follow-up data collection method. Using appreciative inquiry, positive experiences and suggestions that surfaced in the interviews became the foundation of the questions in the learning circle.

All employees were invited to attend the learning circle via an email, except the CEO and CFO. The CEO and CFO were excluded due to power-over relationships. Nine volunteers participated in the learning circle.

Except for the CEO and CFO, no other power-over issues were identified. I conducted all interviews myself, facilitated the learning circle, and transcribed the interviews and learning circle data using a variety of resources: a professional transcriber, the online software Trint (https://trint.com/), and myself.

To support me in my role as the leading researcher, I enlisted the help of an inquiry team. My inquiry team consisted of two individuals. As an outside researcher, one inquiry team member was an Imaginea employee who had the ability to advise me on organizational norms and protocols in addition to providing access to parts of the organization or resources that as an outside researcher I could not have acquired on my own. A fellow member of my Royal Roads

University Master of Arts in Leadership (MAL) cohort also participated in the inquiry team. With each inquiry team member, I reviewed the purpose of my project, including confidentiality and their roles in the inquiry. My inquiry team provided input on the draft interview and learning circle questions, methods, and overall research design. They played a role in piloting the draft methods to ensure the questions were clear and compelling. The Imaginea inquiry team member participated in the learning circle. My MAL cohort inquiry team member provided input into data interpretation and helped to identify potential areas of bias. Both inquiry team members signed an Inquiry Team Member Letter of Agreement (see Appendix B).

Inquiry Project Methods

The two qualitative data collection methods used to research the inquiry are outlined in this section. The two methods in addition to the literature review were used to gain a broader understanding of the stakeholders' perspectives and how they define their reality. In addition to the description of the data collection methods, the study conduct and data analysis are also discussed in this section.

Data collection methods. This inquiry engaged participants in two qualitative data collection methods, including interviews followed by a learning circle. The methods used and questions asked in this inquiry were intended to allow participants to feel comfortable, open, and honest when sharing stories in an effort to enhance commitment to their organizational model. The information gathered throughout the interviews influenced the story topics of the learning circle and were approved by an inquiry team member.

Interviews. Stringer (2014) highlighted that interviews "are a reflective process that enables the interviewee to explore his or her experience in detail and to reveal the many features of that experience that have an effect on the issue investigated" (p. 105). In addition, Laloux

(2014b) stated, “Consciously or unconsciously, leaders put in place organizational structures, practices, and cultures that make sense to them that correspond to their way of dealing with the world” (Part 1, Section 1.2, para. 15). As an outside researcher, deeper understanding of Imaginea’s organizational culture that dictates behaviours and processes was required. Rubin and Rubin (2005) stated that it is useful to use interviews “whenever you need to learn about something in depth from other people’s points of view” (p. xvi).

The interviews were set up in a semi-structured format consisting of several key questions. Sekerka, Brumbaugh, Rosa, and Cooperrider (2006) summarized a four-step process that appreciative inquiry follows in an effort to bring forth positive change in an organization. In the first phase—the discovery phase—interviews are used to allow the participants the opportunity to become increasingly aware of the positive attributes of the organizational structure, and therefore, appreciation escalates, hope grows, and community expands (p. 453). The questions were designed to draw out positive stories and allowed for divergence in order to pursue an idea or response in more detail. Gaining insight and context was critical for discovering unknown factors capable of increasing commitment to the organizational structure. By choosing to interview all respondents to the invitation, a deeper understanding of the beliefs or motivations that lead to ownership of the self-managing organizational structure emerged, which were then categorized. These categories became the foundation on which the stories of the learning circle were based.

The interviews conducted lasted between 45 to 75 minutes in length. Although a more in-depth understanding was required in regards to the organizational structure, there are drawbacks to using semi-structured interviews. Anyan (2013) analyzed asymmetrical power relationships in interview research and concluded that an interview is a specific form of a conversation where the

interviewer sets the rules of the game (p. 6). Generally, the interviewer defines the interview situation by initiating the interview, deciding and posing the questions, following up on answers, and finally, closing the conversation (p. 7). To alleviate the asymmetrical power relationship, interview questions were forwarded to participants before the interview. In addition, questions were written in a positive, non-threatening way and piloted by an inquiry team member. The interview concluded with an open-ended question that allowed the participants to add any additional comments or concerns about the study.

Learning circles. Imaginea is based on a concept of fairness, collaboration, and distributing leadership throughout the organization. Although there are many types of circles, my research led me to follow "The Circle Way," which was founded by Christine Baldwin and Ann Linnea. "The Circle Way offers a social structure that often helps conversation arrive at a deeper more intentional place" (Baldwin & Linnea, n.d., para. 1). Schein (2009) stated that everything you do is an intervention and every interaction has consequences (p. 655), thus participating in the learning circle itself engaged team members in open and honest conversation, allowing them to understand other participants' views and experiences. Stringer (2014) stated, "The task of the action researcher is to develop a context in which individuals and groups with divergent perceptions and interpretations can formulate a construction of their situation that makes sense to them all—a joint construction" (p. 75).

The circle's success is a function of the attendees' participation. Baldwin (1998) described the energies, both positive and negative, that each person brings to the circle. She stated,

> We are so sensitive to each other that one individual coming into the interpersonal field emitting anger or fear sets off a vibration in the group that impacts everything that is

about to happen—even if the source of the vibration is never identified or mentioned. (p. 144)

The effort was made to address all attendees when they arrived, welcoming them personally to the circle. In addition, all aspects of the circle, including snacks and refreshments, the location, the centre, and the talking piece were chosen purposely to create a welcoming feeling.

Study conduct. After obtaining approval from my academic supervisor, sponsor, and the Royal Roads University ethics review board, my sponsor and I informed the stakeholders of the next steps, which included reviewing the proposed methods, the ability for everyone to participate, and the selection process of participants.

Interviews. Upon receiving ethics approval, I asked members of my inquiry team to review my interview questions (see Appendix C). My inquiry team members assisted with piloting the interview process, including potential locations, the effectiveness of the selected questions, and recording devices. Once the interview questions were pilot tested and approved, an invitation to be interviewed was sent via email to all Imaginea employees (see Appendix D). I had six positive responses volunteering to be interviewed. Included in the six responses were the CEO and CFO. The remaining four participants represented a good cross-section of the organization; therefore, it was decided that all six would be interviewed. Interviewees were informed at the beginning of the interview that a random draw did not take place and that I had decided it was important to hear the voices and thoughts of all the team members who volunteered.

Once it was decided that all volunteers would be interviewed, an email confirmation of participation along with a consent form (see Appendix E) and request for dates and times to suit their timeframes was sent. Once a time and location were determined, interview questions were

sent to the participants in advance to allow them time to review questions and reflect on their responses (see Appendix C). All interviews took place at a convenient location for the interviewee, which was tailored for comfort and privacy. At the beginning of the interview, I reiterated details regarding privacy and confidentiality and confirmed permission to audio record the session. The interviews lasted between 45 to 75 minutes in length.

The original invitation to stakeholders was sent out by my sponsor's assistant, with all other correspondence directly between myself and the participants. All interview data have been stored in a locked filing cabinet located in my home, and all electronic data have been stored on a password-protected laptop. All raw data will be destroyed upon graduation or according to ethical practice.

Learning circle. Similar to the process used for the interviews, upon ethical approval and after the interviews were completed, together with one or more of my inquiry team members, we pilot tested the learning circle process and questions (see Appendix F) to ensure meaningful dialogue would be forthcoming. During a weekly company-wide meeting, I updated the Imaginea team, detailing the completion of the interview process and to expect an invitation (see Appendix G) via email to participate in the learning circle process. At that time, I reminded the stakeholders that participation was voluntary.

Once a date, venue, and time of the learning circle were scheduled, my sponsor's assistant emailed an invitation to participate to all Imaginea team members except the CEO and CFO. All other correspondence was directly between myself and the participants. At the RSVP date, six team members had volunteered. Consent forms (see Appendix H) were sent to the confirmed participants. On the day of the learning circle, three additional team members volunteered to participate. Prior to commencing the learning circle, consent forms were made

available to participants who had yet to return their forms. The consent form addressed participant's right to withdraw at any point without prejudice, an audio recording of the session, and confidentiality and privacy limitations of a group activity. In addition, before officially opening the circle, I addressed confidentially and privacy expectations of participants in the circle as well as confirmed the audio recording of the circle. The purpose of the project and details regarding a learning circle were also relayed to participants prior to officially starting the circle.

The learning circle consisted of nine participants plus myself as facilitator and guardian. An inquiry team member, who was an Imaginea employee, took part in the circle as a participant. I took responsibility for the audio recording of the circle; two audio recording devices were used to mitigate any technical problems. The official part of the learning circle lasted approximately 55 minutes. All data gathered from the learning circle were stored on a password-protected laptop with hard copies of consent forms and notes stored in a locked filing cabinet located in my home. All raw data will be destroyed upon graduation or sooner as per ethics guidelines.

As an outside researcher, I was acting as a facilitator, helping the Imaginea team "define their problems clearly and to monitor and support their activity as they work toward effective resolution of the issues that provide the focus of their investigations" (Stringer, 2014, p. 20). Through the data collection methods, 13 categories were created, which produced three overarching themes. In addition to the themes identified through the data collection, connections were formed in the learning circle. The learning circle itself may have created a mutual connection amongst the participants. The dialogue regarding the format of the circle and how it could be used for conflict management as a method for speaking with the CEO and CFO about

feelings that surfaced in the circle were informally discussed between participants after the official conclusion of the circle. Details of these discussions were not recorded or included in this inquiry. However, the discussions were a desired outcome of the method.

In order to validate and authenticate the summaries and important themes, key findings from the interviews and learning circles were reviewed with my MAL cohort inquiry team member and with my sponsor. An informal summary that contained data findings, major themes, and draft conclusions was reviewed with Suzanne West as my sponsor, key stakeholder, and CEO of Imaginea in an effort to seek feedback. A follow-up meeting was held with Suzanne to review final conclusions and preliminary recommendations. Further, final recommendations were supplied to Suzanne.

Data analysis. Patton (2002) explained that "the quality of qualitative data depends to a great extent on the methodological skill, sensitivity, and integrity of the researcher" (p. 5); therefore, it was crucial that issues of reliability, validity, authenticity, and trustworthiness be addressed during the data analysis stage. The interviews were conducted in a semi-structured way in an effort to address fundamental questions and to aid in the data analysis. Immediately following each interview, I journaled observations, thoughts, and ideas about the discussion. The interviews were transcribed verbatim as soon as possible to protect the data against bias and to provide a record of what was and was not said. This process ensured the integrity of the interview data. In addition, transcripts were forwarded to each interviewee for his or her review to ensure that intent was captured correctly.

Immediately following the learning circle, I debriefed with a member of my inquiry team who participated in the learning circle. Fereday and Muir-Cochrane (2006) stated that the process of checking in with members was a method sometimes used to validate participant's responses to

a researcher (p. 3). Member check-in was accomplished with interviewees through a transcript review. Learning circle participants were given an opportunity to validate the circle through the checkout when they were asked to share their main take away from the circle. After the debrief, I journaled my thoughts, observations, and ideas about the learning circle. The learning circle was transcribed verbatim to protect and ensure the integrity of the data. In addition to reviewing the data with my MAL inquiry team member, to further ensure the validity and trustworthiness of the data collected, a few approaches, including the member check-in and a thematic analysis, were implemented.

As noted by Fereday and Muir-Cochrane (2006), "Thematic analysis is a search for themes that emerge as being relevant to the description of the phenomenon. . . . The process involves the identification of themes through 'careful reading and re-reading of the data'" ("Demonstrating rigor," para. 1). It is a form of pattern recognition within the data, where emerging themes become the categories for analysis. By using thematic analysis, transcripts from the six interviews and the learning circle were colour coded, cut into quotes, and using flip charts were categorized into 13 different groupings. I was aware of the potential for researcher bias; therefore, careful attention was made to ensure that the quotes were used in the proper context and that the overarching themes were supported by excerpts from the raw data. The transcripts were then re-examined to further explore the inquiry topic to help identify themes that would structure the results. Within the 13 different groupings, three significant themes emerged, which seemed to be evident within and across the different categories. Throughout the research process, ethical guidelines were followed.

Ethical Issues

In Canada, research involving humans is guided by the *Tri-County Policy Statement: Ethical Conduct for Research Involving Humans*, which resulted from a joint initiative between three federal research agencies: the Canadian Institutes of Health Research, the Natural Sciences and Engineering Research Council of Canada, and the Social Sciences and Humanities Research Council of Canada [Tri-Council], 2010. The Tri-Council (2010) seeks to ensure that respect for human dignity is the underlying value of all research. The mandate of this policy is based on the core principles of "Respect of persons, Concern for welfare, [and] Justice" (p. 8). Due to the participatory nature of action research, ethical implications involving the participants were considered. Since I was not an employee of Imaginea, there were no power-over or authority issues. How the Tri-Council's core principles were addressed is outlined in the next sections.

Respect for persons. Respect for persons is the obligation of the researcher to ensure respect for the autonomy of participants and "to protect those with developing, impaired or diminished autonomy" (Tri-Council, 2010, p. 8). Respect for autonomy means that as a researcher, I demonstrated "commitment to accountability and transparency in the ethical conduct of research" (p. 9) and ensured individuals understood that they had the freedom to decide, without interference, their participation in the research. To ensure participants made an informed decision, the invitation to participate provided them with a clear written description of the research. The invitation and follow-up confirmation of participation addressed the "purpose, aims, use of results, and likely consequences of the study, a process known as informed consent" (Stringer, 2014, p. 54). In addition, before any method session began, I verbally asked if the participants had any questions and reiterated that participants did not have an obligation to participate in the research and had the right to withdraw at any time without consequence.

Concern for welfare. As stated in the Tri-Council's (2010) policy statement, "Welfare consists of the impact on individuals of factors such as their physical, mental, and spiritual health, as well as their physical, economic, and social circumstances" (p. 9). This research project was structured to avoid detrimental effects to any participant and where the outcomes should "devise sustainable improvements in practice that enhance the lives and well-being of all participants" (Stringer, 2014, p. 5). However, due to the nature of the group method used, participants of the learning circle signed a consent form (see Appendix H) and were reminded of confidentiality, including disclosing who was present at the circle.

Concern for justice. The Tri-Council (2010) stated, "Justice refers to the obligation to treat people fairly and equitably" (p. 10). As such, all Imaginea employees were considered stakeholders and invited to participate in the learning circle. Further, all employees were given an opportunity to be interviewed. Everyone who wished to participate in the learning circle and be interviewed was accommodated.

Conflict of interest. As an outside researcher, I did not consider power-over to be an issue. However, I did consult with my Imaginea inquiry team member to ensure that any perceived or real power-over issues were addressed when designing the learning circle. No power-over issues were identified with the participants.

Chapter Summary

The action research approach and methodology used in the research phase of this project were outlined in this chapter. The project participants and inquiry methods used, including the data collection methods, study conduct, and data analysis, were described in addition to addressing potential ethical considerations. The action research findings and conclusions drawn from the interviews, learning circle, and literature review are presented in the next chapter.

Chapter Four: Action Inquiry Project Findings and Conclusions

A detailed description of the research study findings, a summary of conclusions, and the scope and limitations of this research are presented in this chapter. The primary inquiry question in this research was: How might a dialogic process help Imaginea Energy strengthen its commitment to a self-managing organizational model? The following sub-questions assisted with understanding the current culture at Imaginea among the employees and supports needed to help strengthen commitment to the organizational model: (a) What are the stories told by Imaginea employees about their previous experiences with self-management; (b) What are the hopes and opportunities identified by the employees of Imaginea for the organizations full transition to a self-managing organizational structure; (c) How might a self-managing organizational structure help Imaginea be successful in a VUCA (volatile, uncertain, complex, ambiguous) environment; (d) What conditions does Imaginea currently have in place that foster and support a self-managing system that contributes both to personal well-being and to the achievement of collective objectives; (e) What are the stories told by the Imaginea employees that show widespread distribution of authority where employees are empowered to take a leadership role; and (f) Among the distinctive processes and practices to Imaginea Energy, which ones are important to continue developing in an effort to enhance a self-managing organizational structure?

Study Findings

In this study, employees of Imaginea were invited to reflect on how their current corporate culture is contributing to the full implementation of a self-managing system and space to articulate how they see themselves as part of the system. Team members who participated in an interview or the learning circle were invited to share positive experiences as a result of their

employment with Imaginea and how they envisioned the future. The findings revealed three dominant themes. The first theme revealed was that most employees recognized that adopting a new way of thinking and operating was required to help them reach their vision. Team members defined their self-managing organizational structure and contributed strategies for continuous improvement. The second theme highlighted leadership attributes that would continue to enhance a self-managing organizational structure. The third theme addressed the success strategies around working in a respectful, diverse workplace. Many of the findings supported more than one of these identified themes. The three findings can be further summarized as:

1. Define the current organizational structure and culture
    a. The organizational structure: The freedom to shine
    b. Role flexibility and clarity
    c. Sources of role clarity
2. Leadership attributes in a self-managing organizational structure
    a. Participants showed a firm understanding of what needs to be done inside the organization to move the company closer to reaching its vision.
    b. Participants are prepared to increase communication.
3. Success strategies around working in a respectful, diverse workplace
    a. The duality of diversity
    b. Importance of trust and shared values
    c. Onboarding is valued

Two data collection methods were used in this inquiry. The first method was one-on-one semi-structured interviews. All employees were invited to participate, where six interviews were conducted. The second method was a learning circle, in which all employees were invited to

participate, except the CEO and CFO due to possible power-over issues. Nine team members volunteered to participate. All participants in both methods appeared engaged, expressed interest to be part of the solution, and grateful to be a team member at Imaginea. An in-depth discussion and analysis of each of the themes are presented in this section. To protect the anonymity and confidentiality of all participants, any direct quotes attributed to participants in the interviews were labelled as I-1, I-2, I-3 and so on, and by the qualifier of LC for learning circle participants. Further, I received approval to identify the CEO's quotes under certain circumstances to highlight where there may be alignment or opportunities to address discrepancies.

Finding 1: Define the current organizational structure and culture: There was a consensus among Imaginea employees as they articulated how the organizational structure could help them reach their vision. The term "flexibility" was used consistently and repeatedly throughout the interviews and the learning circle. Some interviewees were able to articulate in more specific terms, including:

> If we're going to make the true change of making this energy industry better for planet, people, profit, it doesn't just stop at Imaginea. It has to include everybody else, and our organizational structure, gives us the flexibility of, if this opportunity from a completely separate industry comes in, we can amalgamate and change our system and change our structure to accept it, not reject it. (I-2)

An interviewee emphasized the link between creative thinking and transformational change:

> You really need to think outside the box as the biggest part because the more you put people into a box and mummy wrap them and red tape them is how I like to word it from my past experience. They just can't make a transformational change. (I-3)

Other interviewees and LC participants spoke about the "adaptability" and "agility" when they described how they envisioned the future of the organizational structure.

Team members were attracted to Imaginea for a variety of reasons which included the leadership, the company vision, the opportunity to work in a game-changing company/ environment, and through job postings. Team members articulated affirmative aspects of working at Imaginea, which included "fascinating, super smart, and intriguing people" (LC), "the leadership" (LC), "opportunity to grow the quickest" (LC), "ability to experiment" (LC), "trailblazing" (LC), and "genuinely inspired to build a clean hydrocarbon" (LC). Although the organizational structure was not explicitly listed as a reason for joining and staying at Imaginea, participants' comments highlighted positive elements of the organizational structure and culture throughout the interviews and the learning circle.

The organizational structure: The freedom to shine*:* Interviewees described positive aspects of the organizational structure that included: "I do not see myself constrained by one box. . . [and] I have the power to make changes" (I-2). In a similar vein, other interviewees expressed enthusiastic support: "You get to shape your own destiny" (I-5) and "There's no red tape" (I-3). Interviewee I-3 expressed future-focused comments such as "You really get to make a difference" and "unending opportunity." This same participant synthesized some of this thinking with: "It's very freeing that you get to establish what you need to move forward, without having to go through a bunch of hierarchy to get it done."

Other participants connected freedom to craft a personal role: "I have been able to make [my role] my own" (LC), and "You get to design your own role" (I-6). A learning circle participant reinforced the freedom to be authentic in how individuals approach and complete their jobs: "Here, it's do whatever you need to do to make it happen in the most sincere and

authentic way" (LC). An interview participant captured the essence memorably, in commenting that the organizational structure is about "really letting people shine" (I-2). The organizational structure allows one to follow one's passion: "I have a big interest in this field [which is outside my set tasks], and I would like to be involved. . . . You do not get shot down for hey that is not really your job" (I-5). The enthusiasm and motivation are evident in this learning circle comment:

> Because when you define your own role, the only limitation is you; nobody around you is putting limitations on what your job that you do every day should look like except yourself. To me, oh man that gets me up. (LC)

Connecting this to an optimal structure, Interviewee I-3 noted, "When it was functioning perfectly, everyone knows what they are fully responsible for, what they can just move on their own" and, when referring to the decision-making process, that the ability to determine "when it can be a solo decision or when it needs to be a peer decision."

In addition to the terms flexibility, adaptable, and agile, the term "flat organization" was used repeatedly and consistently throughout the methods. On occasion, the term flat organization was used to express confusion regarding seniority, hierarchy, or inequality that participants perceived.

Role flexibility and clarity: Several participants emphasised the flexibility in creating their role as a positive aspect of working at Imaginea. One interviewee felt the flexibility was a result of a culture where people are "respected as professionals . . . [and] able to take care of ourselves and do our jobs" (I-3). Interviewee I-2 noted, "I have the ability, if things are not going right, I have the power to make changes." That same participant stated the flexibility in designing the role "improved [his/her] quality of work, satisfaction with work . . . [and allowed

the participant to] operate as a high-performing individual for a longer period." While another participant exclaimed, "I am making it happen, so all the way from idea to execution on a daily basis . . . and do what I love to do" (LC).

Participants did show a desire to learn about other team members' roles and experiences. Interviewee I-6 stated, "We all know what we have to do. . . . [and suggested that a] skeleton . . . [of tasks be drawn up that included] a list of things an E&P needs to do" to show transparency in task distribution and to ensure that the lights stay on. A participant in the learning circle noted that she/he was looking forward to having a process that would give "visibility to what you do, I can learn what you do, and I respect what you do. . . . I think that is a really good process; it will help a lot." In addition to defining roles, participants wondered about the boundaries of their positions. Because the roles at Imaginea are fluid, one interviewee stated she/he was not sure where her/his responsibilities ended (I-3). The same participant suggested that "rough boundaries of responsibility" be defined where individuals can then customize "depending on their experience."

Sources of role clarity: In addition to elements of role freedom and role clarity, participants expressed gratitude and appreciation for the Monday Morning Meeting (MMM). They felt the sharing that happened at the meeting created a sense of "empowerment" (I-5), "brings teams together to work on problems" (LC), and "kept them in touch with tribemates" (I-2). While one participant would like to "encourage everyone to have discussions about what they are working on, what projects they were doing every day, not just at the MMM" (LC).

Participants also recognized the benefit of collaboration and expressed an interest in increasing the amount of collaboration at Imaginea. Learning circle discussion included a specific example when a big issue was solved amongst a small group, with another participant

who appreciated the insight and concurred that the "level of inclusiveness is not quite there right now." Further, in an interview, it was identified that 100-day plans were an individual process. The interviewee questioned when it was appropriate to alter the plans, noting that a struggle exists due to the guilt of not fulfilling a commitment to yourself and your team (I-2). Role clarity and perhaps processes that are individually based may be contributing to the described shortfall in collaboration. On the other hand, when participants addressed a question asking about how they envisioned the organizational structure working in the future, some aspect of enhanced collaboration and desire for role clarity were mentioned four times each.

Finding 2: Leadership attributes in a self-managing organizational structure. The topic of leadership showed up indirectly in many participants' comments. Although the term flat organization may cause some confusion in regards to leadership, participants showed a firm understanding of what needs to be done inside the organization to move the company closer to reaching its vision. A "self-managing organizational structure" seems to reflect better the meaning of the comments made by the participants.

Participants showed a firm understanding of what needs to be done inside the organization to move the company closer to reaching its vision: Throughout the methods, participants were supportive of the self-managing organizational structure and felt that it gave them a "sense of worth" and "proudness" in getting recognition for contributing (I-2). I-2 also explained his/her perspective on intragroup leadership as: "It is just a natural pop up for the leaders in the times that they are needed, and they do not need to remain up there, that is the biggest thing." Identifying that "all [team members] are leaders," having the ability to identify the best person to do a particular piece, and recognizing that "it might not be me" were significant declarations aligned with self-organization (LC). The participant who made this point

also noted that the organizational model allows you to pull together the expertise and set people free to do the job, while continuing to "encourage support" (LC).

Participants' answers to the question requesting a story of empowerment varied from passionate, inspiring stories with specific examples to recognizing and witnessing a fellow team member's story of empowerment. One interviewee summed up with: "It felt really good to be able to go into a company and make that change . . . with a great big win. . . . It was a breath of fresh air" (I-6). Another felt that the team members at Imaginea encourage tackling even "scary" or "daunting" new challenges because of a perceived support system: "I am not being left out here to drown" (I-5).

Participants valued the resources available to them to help them navigate the system: "The best part of Imaginea is that we have so many different resources to tap into and better understand the structure" (I-2). Although resources were available, the findings showed they were not being used to their full potential. Lack of time (I-5) and "fear of opening up" (I-4) were identified as reasons that resources were not sought out or were under-utilized.

In summary, participants valued collaboration and desired more communication. One interviewee described the organization when she/he felt it was working in its most optimal form as: "Communication was flowing, so all the pieces of the pie are talking to one another . . . and the teams are collaborating, and I start seeing accountability" (I-4).

Participants are prepared to increase communication: Participants in the study showed a desire to increase their level of understanding and improve listening skills. The participants offered suggestions on how they could take an active role to facilitate the company's advancement through communication. A few participants acknowledged they needed to take a more active role in both seeking out additional perspectives and increasing understanding about

what was going on in the company (LC). Another concurred, accepting that there is more than one way to solve a problem, while ensuring there is alignment at the end of the day (LC). One participant admitted that "sometimes I just hold on to some of the concepts or questions I may have" and committed to speaking up more (LC). In addition to increased communication, a learning moment was reported to have occurred during the MMM when the participant questioned a process and was reminded that the process "comes from the ground up and not top-down" (LC). Learning circle participants recognized that listening was also a requirement of active communication. One participant committed, "To listen and to actually hear what [others] are saying" (LC). Another participant invited the others to strive to make sure they listen to every member to "open up blind spots," to help identify personal bias, and to help each other get out of "ruts" (LC).

Finding 3: Success strategies for working in a respectful, diverse workplace. Participants in the study showed gratitude and appreciation for the diversity of people who work at Imaginea. Being different was an inspiration to several participants. One participant liked that:

> We are the weird kids on the block. We are like Sesame Street. It is this weird group that wouldn't seem to work back in the 1960s, but we made it work. So we are kind of like a new version of that. We have a lot of intelligent, interesting, and unique people, and I do not think you find this range of unique personalities that are actually allowed to be expressed here. We actually get the freedom to express our unique talents and unique abilities. (LC)

Another participant concurred, saying that he/she liked being "the freaks of the industry" (LC). Both participants expressed their opinions positively, acknowledging the diversity that exists within the Imaginea company walls. This pride in being unique was validated by the CEO:

> Imaginea personalities run rampant because they are part of our genius. We ask people to show up as you. As the physical, emotional, mental, spiritual you. In all of your weird wonderfulness. So that is really great. However, we have rarely taught people the skills and the practices around appreciating diversity.

The duality of diversity: Participants were not only grateful for and inspired by their fellow teammates; reference was made to individuals' abilities to navigate and perform at a high level inside a self-managing ecosystem. The desire to enhance the current conflict resolution process emerged throughout the methods. An interviewee noted that the conflict resolution process needed to be addressed and stated that:

> We need to develop a process that people feel safe if they make mistakes, or if they are in a conflict, that there is a trusted process that people can go through and come to a resolution, correct your behaviours and then move forward; while still maintaining trust with each other. (I-4)

Another interviewee articulated the benefits of having a diverse workplace, but also a "need to be able to harness that diversity in a better way, for both the Imaginea side and from the individual side. That there is that middle ground that exists" (I-2).

The importance of trust and shared values: While some participants spoke about the need for an enhanced conflict resolution process, the participants were not specific as to what was causing the conflict. Participants did show a willingness to effect positive change and spoke about creating an environment of trust. An interviewee stressed the importance of trust, while acknowledging "that is where elemental org should really work well" (I-6). Another participant stated, "If we build up the trust and respect of our own domains and just know that the right person is here and they can get it done, I think we will be unstoppable" (LC). Another participant

concurred and added that trust would "strengthen the organization" (LC). The desire to be trusted and to trust that others would perform their tasks was consistent among the participants. One participant suggested, "If we want true trust and respect and we want people to recognize our capability, we have to live up to that, . . . and I think if we can just push that more and expand that for each individual, we will just rock it" (LC). While another participant spoke about "trusting people's strengths and being able to say, actually in this project the best person to do this piece is . . ." Participants were also able to say how they could affect the trust level by "teaching more to create better understanding, trust, and respect" (LC).

Interviewees were asked about their values. Three of the respondents, including the CEO, noted trust as a value. Trust was identified as being mission critical to the success of the organizational model (CEO).

Operating in a self-managing system requires high levels of self-mastery and skills beyond technical capabilities. As part of the self-managing structure, Imaginea provides the resources to employees that allow them to uncover internal boundaries, face fears, and further understand their own "strengths and weakness" (I-4). All participants praised Imaginea for the self-development that has been provided. One participant identified the personal development as the most appreciated process (LC). Another participant said, "It has just made me a better employee, but also builds me up and shows me I am capable" (LC). One participant recognized that "it helps you step out, whether it is a big step or just working towards something . . . [or it helps you to] get over some of the stuff that you tell yourself" (I-5). When explicitly asked if the participants used the coaching, only one interviewee took advantage of the coaching on a regular basis.

Throughout the learning circle, participants referenced the personality assessments that were done in the past. Participants were thankful to Imaginea for giving them the opportunity to partake in the tests and recommended that the assessments be referred to and used more often. Participants in the learning circle stated they could be used "for improvement," linking them "to our development," and "using them when working with coaches." One participant questioned, "How can they be used to expand what you are capable of doing?" (LC).

Another aspect of self-development that surfaced was the desire for feedback and need to feel valued. Participants spoke about the Accomplishments and Commitment (A&C) process with enthusiasm. It was a desired process to continue with and enhance, as it was a way that "the company recognize[ed] the effort you are putting in" (I-3), "allows you to keep in touch with your tribemates" (I-2), and "gave accountability" (I-2, I-3). In addition, the process allowed one to "understand what [your teammates are] working on, how we can assess where the struggles are and solves a lot of verbal communications" (I-2). Continuing on the need for value, one participant took the initiative to seek out constructive feedback on a quarterly basis. Interviewee I-2 felt that it was "crucial to making sure [their] barometers [were] in check." The same participant's perspective was that "other people have not taken advantage of" the feedback loops that are available. Resources are available to employees that will help them achieve their goals; reasons for not utilizing the resources more regularly were beyond the scope of this study.

Onboarding is valued: The inquiry discovered that the onboarding process is similar to many processes at Imaginea, in that it is always evolving and improving. One participant relished a recent onboarding experience, as it brought different team members together for a common purpose (I-4). A few participants noted that they had little onboarding. However, they felt supported in the group, comfortable to ask any questions, and felt comfortable to recommend

things that would affect positive change in the future hiring process (I-2, I-3, I-5). Interviewee I-3 also acknowledged that a new hiring and onboarding process was being rolled out.

Summary of study findings. The findings represent the themes that were most prominent in the interviews and the learning circle. The three central themes focused on defining the current organizational structure and culture, leadership attributes in a self-managing organizational structure, and requirements for working in a respectful, diverse workplace. Each theme and finding is interrelated with the other themes and findings, establishing that if the organization focuses on one area to improve, the other areas will benefit as well. Throughout the methods, participants were supportive of the organizational model, showed an open-mindset, and made recommendations that could cause positive changes to the Imaginea self-managing ecosystem.

Study Conclusions

Through a comparative analysis of the relevant literature together with the inquiry findings, five conclusions were established. These conclusions relate directly to the inquiry sub-questions, where the overarching research question is addressed within the summary of the conclusions. By addressing the themes that emerged through the sub-questions, Imaginea will continue to strengthen their commitment to the organizational model. The conclusions are as follows:

1. Participants are supportive of the self-managing organizational structure and recognize that it will help them reach the company's vision.
2. The self-managing organizational structure gives participants the ability to shine. Participants held an open mindset and a willingness to learn a new way of working.

3. Role flexibility is revered. Further conversations are desired to assist team members in defining their roles, while understanding fellow team members' functions, in an effort to work together more deliberately.
4. Participants showed a firm understanding of what needs to be done inside the organization to move the company closer to reaching its vision. Further conversations are encouraged around shared leadership to promote mutual expectations and understanding.
5. Team members showed appreciation and gratitude to Imaginea for embracing a diverse workplace. They also require appropriate tools and skills to enhance collaboration and maximize their collective wisdom.

Conclusion 1: Participants are supportive of the self-managing organizational structure and recognize that it will help them reach the company's vision. This conclusion addressed the sub-question: How might a self-managing organizational structure help Imaginea be successful in a VUCA environment? Common language was shared by all participants that spoke about the "flexibility," "adaptability," and "agility" of the self-managing organizational structure. The participants concurred that a new way of thinking was necessary to make the transformational changes required to move the company toward their vision.

Participants spoke positively about why they came to Imaginea and why they stay. In addition, the literature supported the organizational model. The literature review showed that self-management has been proven to increase productivity and focuss on common goals, increased information sharing, enhanced team performance, has positive association with innovation, and was most effective in complex environments (Druskat & Wheeler, 2003; Hoch, 2012; Moe, Dingsuyr, & Dyba, 2009; Rapp, Gilson, Mathieu, & Ruddy, 2016; Small & Rentsch,

2010; Wang, Waldman, & Zhang, 2014). Hoch (2012) further added "[that] understanding how organizations can enhance their own innovation is crucial for the organization's competitiveness and survival" (p. 159).

Conclusion 2: The self-managing organizational structure gives participants the ability to shine. Participants held an open mindset and a willingness to learn a new way of working. This conclusion addressed the sub-question: What are the stories told by Imaginea employees about their previous experiences with self-management? Participants spoke positively about how the organizational structure allowed them to follow their passion (I-5), gave them the "opportunity to grow the quickest" (LC), allowed them "to shape their own destiny" (I-5), and gave them "unending opportunity" (I-3). Participants were supportive of the organizational structure, as they felt it was "empowering," "improved [their] quality of work, [their] satisfaction with work," and allowed them to "operate as a high-performing individual for a longer period" (I-2), while giving people the opportunity to shine (I-2). The participants had a strong foundation in regards to understanding a self-managing organizational model. As the participants continue to learn about self-managing systems by building awareness around mutually agreeable common language, they have an opportunity to review, redefine, and continuously evolve their organizational structure. In addition, various behaviours and expectations can be explored together to give a better understanding of self-managing teams.

Hackman (2009, p. 763) defined self-managing organizations by how authority was determined in regards to how work was executed, monitored, managed, and designed. He stated that self-managing was responsible not only for executing tasks, but also for monitoring and managing their own performance (p. 765). Participants showed understanding of a self-managing system. Participants showed enthusiasm and a sense of empowerment for the freedom they had

been granted. On occasion, participants used language that was consistent with a flat organization or a laisse-fare organizational structure. For example, when participants used statements that actuated individualism versus supporting a team dynamic, they may have been inconsistent with the literature review on effective self-managed teams. One statement that may require further discussion included "decisions made all by ourselves" (I-2). The participant recognized the weight of the decision and guilt of letting the team down if the decision moved the company in the wrong direction. Another statement was: "I am making it happen, so all the way from idea to execution on a daily basis" (LC). The participants showed passion and excitement over the autonomy they had been granted.

The philosophy of self-managing organizations is based on the fundamental idea of distributed leadership, where teams share decision-making authority jointly.The structure abolishes centralized decision making and cautions against decentralized decision making where team members make independent decisions (Druskat & Wheeler, 2003; Moe et al., 2009; Rapp et al., 2016). Further, the literature stated that both laisse-fair and flat organizational structures had been proved to be ineffective (Antonakis et al., 2003; Weisbord, 2012). However, the literature supported that when team members make joint decisions, productivity and focus on common goals is increased (Druskat & Wheeler, 2003; Moe et al., 2009; Rapp et al., 2016).

Participants recognized the benefit of collaboration and expressed an interest in increasing the amount of collaboration at Imaginea. To enhance collaboration, Hackman (2009) suggested that well-designed self-managed teams monitor their performance continuously by actively seeking data and feedback to learn how well they are accomplishing their tasks (p. 767). Team members noted that the formal feedback process was voluntary and felt that the resource was underutilized. The continuous informal feedback process was not explicitly addressed in the

methods; however, the terminology used in a group setting referencing "we" or "team" was noticeably absent throughout the data gathering methods. Although participants showed a strong desire to increase collaboration, the emphasis on the individual autonomy was highlighted as being a positive aspect of working at Imaginea. The literature posited that poorly designed teams or ones that are performing independently of the team are easily outperformed by smoothly functioning traditional units. On the other hand, "self-managing teams that function well can achieve a level of synergy and agility that never could be preprogrammed by organization planners or enforced by external managers" (Hackman, 2009, p. 772).

Understanding the role the team members undertake is essential to implementing the self-managing system effectively. It was noted that well-designed self-managing teams make joint decisions, but Laloux (2014b) cautioned that people who are new to the idea of self-management sometimes mistakenly assume that it simply means taking the hierarchy out of an organization and running everything democratically based on consensus (Part 2, Section 2.3, Misperception 1, para. 1). Further understanding of team members' perspectives on the organizational structure, the role of the self-managing team, and the team decision-making process may lead to opportunities to further evolve the organizational structure. The literature showed that by continuing to build awareness on effective self-managing teams, Imaginea will be better able to define the system that works for them. In moving to an organizational model that values collective wisdom, team members are invited to take a shared leadership role, both within their teams and amongst the Imaginea ecosystem.

Conclusion 3: Role flexibility is revered. Further conversations are desired to assist team members in defining their roles, while understanding team members' functions, in an effort to work together more deliberately. This conclusion addressed the sub-question: What

are the hopes and opportunities identified by the employees of Imaginea for the organization's full transition to a self-managing organizational structure. As a result of the organizational structure, together with a culture where people are "respected as professionals" and "able to take care of [themselves] and do [their] jobs" (I-3), Imaginea grants its team members flexibility in designing individual roles. The appreciation for role flexibility was echoed throughout the interviewees and learning circle, where one participant exclaimed that each individual was the only limitation to what you can accomplish (LC).

Participants recognized the empowerment that they felt in playing to their strengths by the ability to recreate their roles. In addition to the appreciation of role freedom, many participants in the study expressed a desire to understand fellow teammates' functions and experience better. Participants acknowledged that they are aware of what needs to be done while recommending a "skeleton" (I-6) of tasks or "rough boundaries" (I-3) be drawn up to assist with function clarity. The literature review supported the participants' desire to learn about other team members' roles and experiences.

The literature supported that reducing the ambiguity with regards to roles, procedures and guidelines by establishing agreed upon territories, clearly defining tasks, allocating responsibilites, and agreeing upon the decision-making process will decrease the frequency of concflict in self-managed teams (Brown et al., 2005; Bunderson & Boungarden, 2010). The literature also showed that self-management is never clear-cut and that to be effective, structure should be defined by the Imaginea teams themselves and not imposed on the team.

Conclusion 4: Participants showed a firm understanding of what needs to be done inside the organization to move the company closer to reaching its vision. Further conversations are encouraged around shared leadership to promote mutual expectations

and understanding. This conclusion addressed the two sub-questions: What are the stories told by the Imaginea employees that show a widespread distribution of authority where employees are empowered to take a leadership role; and Among the distinctive processes and practices to Imaginea Energy, which ones are important to continue developing in an effort to enhance a self-managing organizational structure? The participants felt empowered at Imaginea. Participants shared inspiring stories detailing when they felt they had an impact on the company. Participants recognized that leadership took on many facets by identifying that "all [team members] are leaders," having the ability to identify the best person to do a particular piece, and recognizing that "it might not be me" were significant declarations aligned with self-organization (LC). The participant who made this point also noted that the organizational model allows one to pull together the expertise and set people free to do the job, while continuing to "encourage support" (LC).

The findings showed that not only is shared leadership currently present amongst the teams, but also participants have suggestions that will continue to develop a team member's contribution mindset. The suggestions were geared towards understanding one another, themselves, and how they can make a difference by possessing the willingness to take the initiative to do so. The literature supported the team members' initiatives, where self-leading through distributed leadership is a requirement of self-managed teams (Stewart et al., 2011). Further, people need to take personal responsibility for the outcomes of their work and show, in their behaviour, that they feel personally accountable for the results (Hackman, 2009, p. 766). In addition to possessing the willingness to take the initiative, participants in this study spoke about the A&C process positively and with enthusiasm. The A&C was a process that allowed work to be recognized, showed accountability when commitments were fulfilled, and was a process that

was identified to continue and be enhanced. The A&C process allowed team members to "access where the struggles are" (I-2), allowing an opportunity to intervene in feedback loops. Small and Rentsch (2010) stated, "A willingness to cooperate and work interdependently with others and to influence and be influenced by other team members is likely to be associated with engaging in shared leadership" (p. 205). Further, for enhancing the feedback loops, one participant "encourage[d] everyone to have discussions about what they are working on, what projects they were doing every day, not just at the MMM" (LC).

The Imaginea team has recognized that they work inside a complex industry and further have adopted a complex organizational structure. The literature not only described how complex environments required more than one individual to play the leader role (Morgeson, DeRue & Karam, as cited in Wang et al., 2014, p. 185), but went further to also show that the more complex the environment, the greater the effects of shared leadership (Wang et al., 2014, p. 193).

On the topic of leadership, Hackman (2009) stated that when people do not have what they need to perform well, they actively seek from the organization the guidance, help, or resources they need for excellent performance, and they do so assertively and constructively (p. 768). This behaviour takes initiation and leadership to ask the questions that are required. Participants in the study showed a desire to increase their level of understanding and improve listening skills. The participants offered up suggestions on how they could take an active role to facilitate the company's advancement. A few participants acknowledged they needed to take a more active role in both seeking out additional perspectives and increasing understanding about what was going on in the company (LC). Another participant concurred and had accepted that there is more than one way to solve a problem as long as there is alignment at the end of the day

(LC). The participants showed a keen understanding of shared leadership and offered a shared strategy moving forward.

The literature reviewed all showed a positive relationship between shared leadership and team effectiveness when the self-managed team members were functioning well together. As team members continue to develop shared leadership attributes, encouraging dialogue on experience, trust, and communication will help team members navigate their self-managing ecosystem.

The use of the term flat organization was repeatedly used throughout the interviews and the learning circle. Participants displayed leadership throughout the methods and a firm understanding of required leadership attributes as they articulated stories about empowerment. However, as a result of using the term flat organization versus self-managing, confusion over hierarchy was relayed. The literature was clear that effective self-management is not possible unless someone exercises authority to set the direction for the performing unit (Hackman, 2009, p. 773). In addition, Hackman (2009) stated, "Because self-managers are not given detailed, step-by-step behavioural prescriptions, it is imperative that they have some clear set of values or aspirations to use in evaluating ways they might proceed" (p. 775). Further, the literature supported that enhanced task feedback, the creation of a shared vision, promoting group cohesiveness, inspiring followers to have a voice, and encouraging the team to perform beyond expectations are additional crucial duties a leader has to fulfil to push self-managing teams into a more self-independent direction (Anderson & Sun, 2017; Williams et al., 2010). In addition, the literature noted that extreme forms of egalitarian organizations where all hierarchy is abolished, giving everyone the same power and making all decisions by consensus, have not been successful or meaningful (Laloux, 2014b, Part 1, Section 1.1, Green Organizations, para. 1). In

comparison, lack of active leadership, coined laissez-faire leadership, has also been proved to be an ineffective leadership style (Antonakis et al., 2003; Weisbord, 2012).

Leadership shared amongst the self-managed teams and the roles of formal leadership are critical requirements of a successful self-managing organization. The findings showed that Imaginea has been successful in distributing leadership throughout the organization and allowing the space for team members to step into a leadership role. Further, the findings demonstrated that participants have both showed initiative in making things happen and a willingness to cause positive change. To assist team members, the literature noted that the self-managed teams that achieved the highest degrees of success received a great deal of training before implementation (Chaneski, 1999, p. 52).

Conclusion 5: Team members showed appreciation and gratitude to Imaginea for embracing a diverse workplace. They also require appropriate tools and skills to enhance collaboration and maximize their collective wisdom. This conclusion addressed two sub-questions: What are the hopes and opportunities identified by the employees of Imaginea for the organization's full transition to a self-managing organizational structure, and What conditions does Imaginea currently have in place that foster and support a self-managing system that contributes both to personal well-being and to the achievement of collective objectives? By addressing these sub-questions, there is an opportunity for teams to celebrate team members' views on diversity, further explore the concept of conflict, and embrace the resources that Imaginea offers.

The literature provided a positive relationship between various contexts and team effectiveness. One context was team diversity. The participants recognized this positive relationship with enthusiasm. Not only did participants express gratitude and appreciation for the

diversity of people who worked at Imaginea, but it was also noted that being different was an inspiration to several participants. One participant noted that having the ability to work alongside "fascinating, super smart, and intriguing people" was a reason why she/he joined Imaginea (LC). The literature suggested sharing a positive diversity mindset, meaning team members espouse a belief in the value of diversity and building a climate free of discrimination, can play an essential moderating role in the effects of diversity on team performance (Knippenberg et al., 2013, p. 185) thus negating adverse consequences that diversity may cause. By sharing a positive diversity mindset, the Imaginea team has shown readiness and openness for diversity training.

Although diversity can enhance as well as disrupt team performance, exploring the concept of conflict may benefit the Imaginea team. By valuing collaboration and acknowledging the benefit of collective wisdom, many participants expressed a desire for an enhanced conflict resolution process. The reason for the conflict was not explicitly addressed in this study; however, exploring, defining, and providing clarity around how Imaginea envisions their self-managing system working may alleviate some of the conflicts.

"Contrary to popular myth, great teams are not characterized by an absence of conflict" (Senge, 2006, p. 232). Imaginea values and embraces diversity and encourages disruptive thinking, and therefore, "the free flow of conflicting ideas is critical for creative thinking, for discovering new solutions no one individual would have come up to on their own. Conflict becomes in effect part of ongoing dialogue" (p. 232). In addition, although conflict can be constructive, paying attention to factors in other areas that can decrease the frequency of conflict in self-managed teams is beneficial. At another level, problematic issues may arise because a work organization often has more than one set of values (Parding & Abrahamsson, 2010, p. 295).

The desire to be trusted and to trust that others would perform their tasks was consistent among the participants. Participants recognized that having the ability to trust one another would stengthened the organization (LC). Trust was identified as being mission critical to organizational success (CEO). When asked to identify individual values, three participants noted trust as a personal value. The literature explained that while your thoughts govern your conscious actions, the underlying values directly influence your unconscious behaviours (Roy, 2016). There is an opportunity to review organizational values together with identifying individual values. The value of trust is one example of a shared value that is both desired and critical for company success. The literature explored conflicting values between individuals and the greater community, concluding value differences determine the degree of an individual's membership in a community (Gharajedaghi, 2011, p. 103). Stated another way, the level of integration that Imaginea will achieve may depend on the means by which it dissolves the possible value conflict among all of its diverse team members.

Imaginea offers an abundance of resources to help employees integrate into a self-managing system. The literature revealed that to maximize the possibilities of a diverse team and to set self-managing teams up for the highest degrees of success, training was deemed a critical and an ongoing learning process (Chaneski, 1999). There is an opportunity to review the importance of self-development in a self-managing organization to increase the usage of the available resources.

Summary of study conclusions. The conclusions discussed link Imaginea's description of successes and recommendations for the future to the research from scholars, thus substantiating the findings. Each conclusion overlapped with other conclusions and, therefore, should be considered as a whole. Though the depth of discussions in both the interviews and

learning circle resulted in a wealth of data leading to the findings and conclusions, the scope and some limitations impacted this inquiry.

Scope and Limitations of the Inquiry

The factors limiting this study will be identified within this section. Limitations such as the participant population and size involved and the nature of the research methods will be discussed. The broad scope of the project together with the timing will also be a topic of discussion. Participants were limited to Imaginea employees and excluded contract operators. The research findings and conclusions are, therefore, limited and unique to Imaginea Energy.

Interviews were used as the first research method, with a learning circle used as the follow-up method. Although high-quality data were provided, only a limited number of team members participated. Participation was on a voluntary basis, and although participation was adequate to fill the chosen methods and was rich in quality, the nature of the data could have been broadened, and research findings could have been more representative with increased team member participation.

The research participants tended to agree on several topics discussed in the findings, where their enthusiasm for the topic of the inquiry was evident within the research. Therefore, it is worthy to question if the participants were drawn to the study due to their pre-established interest, knowledge, and passion around the organizational structure. The participation of individuals with similar perspectives could have acted to limit the research findings.

Imaginea's self-managing system allows for issues to be addressed at a rapid pace. The interviews and learning circle may have brought attention to factors that have been since addressed. Therefore, the findings and conclusions are relevant only at the time of the methods. The methods took place throughout June and July 2017.

Lastly, the research questions and scope of this project were aligned with the stakeholders' needs and my research interests. In working through the research process, it became evident that the research methodology and execution were able to provide broad findings and conclusions about Imaginea's organizational structure, rather than an in-depth organizational analysis. The nature of the broad scope of this research impacted the research conclusions and recommendations, making them more about areas for the Imaginea team to discover together rather than providing particular and granular direction. This was consistent with the culture and practices of the organization.

Chapter Summary

Within this chapter, the results of the research were identified through three significant research findings, which were each elaborated through sub-findings. Based on the findings combined with the literature review, five conclusions were drawn.

Lastly, the scope and limitations of the study were identified and discussed. The findings and conclusions created the foundation for the following chapter, in which I identify study recommendations, organizational implications, and implications for future inquiry, as well as provide a report summary.

Chapter Five: Inquiry Project Recommendations and Implications

The overarching inquiry question explored in this research asked: How might a dialogic process help Imaginea Energy strengthen its commitment to a self-managing organizational model? The change goal was to enhance the organizational structure, resulting in heightened creativity and innovation, through an increased commitment to the organizational model. Six sub-questions were designed to assist with developing the research: (a) What are the stories told by Imaginea employees about their previous experiences with self-management; (b) What are the hopes and opportunities identified by the employees of Imaginea for the organizations full transition to a self-managing organizational structure; (c) How might a self-managing structure help the organization be successful in a VUCA (volatile, uncertain, complex, ambiguous) environment; (d) What conditions does Imaginea currently have in place that foster and support a self-managing system that contributes both to personal well-being and to the achievement of collective objectives; (e) What are the stories told by the Imaginea employees that show widespread distribution of authority where employees are empowered to take a leadership role; and (f) Among the distinctive processes and practices to Imaginea Energy, which ones are important to continue developing in an effort to enhance a self-managing organizational structure?

A number of conclusions were detailed in Chapter Four, including (a) Participants are supportive of the organizational structure and recognize that it will help them reach the company's vision; (b) The organizational structure gives participants the ability to shine. Participants held an open mindset and a willingness to learn a new way of working; (c) Role flexibility is revered. These are clear strengths; nevertheless, further conversations are desired to assist team members in personally coming to terms with flexible roles, while understanding

fellow team members' functions in an effort to work together more deliberately; (d) Participants showed a firm understanding of what needs to be done inside the organization to move the company closer to reaching its vision. Further conversations are encouraged around shared leadership to promote mutual expectations and understanding; and (e) Team members showed appreciation and gratitude to Imaginea for embracing a diverse workplace. They also require appropriate tools and skills to enhance collaboration and maximize their collective wisdom.

Recommendations for action that emerged from this organizational leadership project are outlined in this chapter. These recommendations are offered to Imaginea Energy for consideration in reaffirming and strengthening a culture committed to a self-managing organizational structure. Further, organizational implications, implications for future inquiry, and a report summary are described in this chapter.

Study Recommendations

Five recommendations are offered to Imaginea Energy for their consideration. These recommendations were developed as a result of reviewing the associated literature, findings, and conclusions of the study. The recommendations are:

1. Define the Imaginea self-managing organizational structure by redrawing and defining common language.
2. Learn about self-managing teams—take the time to educate, learn, and adopt what works.
3. Institutionalize success stories: Find ways to share success stories—however small. These are a form or role modelling or pattern for others to learn the same mindset and behaviour.
4. Onboarding—continue with the current practice of ongoing improvement.

5. Commit to self-development and learn the art of feedforward.

These five recommendations align with self-managing principles, where strategic and tactical suggestions are further offered in this section.

Recommendation 1: Define the Imaginea self-managing organizational structure by redrawing and defining common language. Throughout the findings, participants reflected on attitudes, behaviours, and recommended actions for positive change that are consistent with a self-managing organization model. In addition, based on the findings, it was concluded that team members showed a strong desire to increase collaboration, yet participants valued the autonomy they had been granted. Further, comments from the participants highlighting a flat organization or individual autonomy indicated possible barriers to further advancing the self-managing structure. By understanding self-management on a deeper level, team members will be better equipped to understand situations that require team input or where individual decision making is appropriate.

By embracing a self-managing organizational structure, Imaginea has new challenges concerning management of the structure. Learning to live with the amount of freedom and responsibility the self-management organizational model grants its team can take some time and, often, moments of doubt, frustration, and confusion (Laloux, 2014b, Part 2, Section 2.2, No middle management, para. 3). Giving people the freedom to implement solutions to problems and seize opportunities gives team members the ability to demonstrate their resilience, adaptability, and leadership skills. However, the literature supported that a significant amount of training is required to implement the system. I invite the Imaginea team to "create a container that provides the right ingredients and space for participants to inquire together, making room for both individual and collective expression through which old ways of thinking are contested, and

new possibilities emerge" (Bushe, 2014, Changes processes in dialogic OD section, para. 7). Through a more comprehensive understanding of self-management, Imaginea will be able to address the team members' desire for increased collaboration and more thorough understanding of company dynamics while outlining the decision-making process.

More specifically, I would invite Imaginea to relinquish the use of all language relating to a flat organizational structure and become comfortable with naturally dynamic hierarchies of influence based on demonstrating expertise, helping peers, and adding value. The decentralization of the decision-making process makes it imperative that individuals come to terms with their blind spots in regards to how they use and relate to power (Pór, Bradbury, & Uldall, 2017, p. 116). Further, I would offer to Imaginea to move away from wondering how everyone can have equal power to the question: "How can everyone be powerful?" (Laloux, 2014a, para. 11). Doug Kirkpatrick, a self-management consultant, noted that "self-management does not mean doing whatever you want, it is about being part of determining what to do" (Minnaar, de Morree, & Ronner, 2016, para. 7). Understanding how the individuals play an active role in determining the company's future can be accomplished through greater knowledge of how a self-managed organization works.

Imaginea has introduced the elemental organizational chart based on the fundamentals of Mother Nature. The biomimicry approach to innovation by emulating nature's time-tested patterns and strategies complements a self-managing structure and can be used as a tool for a more profound understanding of a self-managing organizational model. However, for it to resonate with team members, it must be relatable. By rediscovering the Elemental Org together with an enhanced understanding of self-management would give team members greater opportunity to make sense of their day-to-day interactions.

Recommendation 2: Learn about self-managing teams—take the time to educate, learn, and adopt what works. In the findings, it was shown that participants had a strong foundation regarding the understanding of a self-managing organization. Further, participants used statements in the findings that highlighted the situational nature of self-management, in which sometimes the autonomy was welcomed, while other times the autonomy was uncomfortable. There is no rule book on self-management; however, understanding the theory and philosophy of the structure on a deeper level would decrease the frequency of conflict in self-managed teams, allowing the team to be more productive. Understanding the role of the self-managed team is critical, as the self-managed team is the core of the self-managing organizational structure. Newer teams to a self-managing organizational structure face a steep learning curve. They are effectively in charge of all aspects of creating and running a small organization, while, at the same time, they are learning to manage interpersonal dynamics (Laloux, 2014b, Part 2, Section 2.2, No middle management, para. 3). This recommendation is further discussed under the suggestions to (a) dedicate resources, (b) write a team charter or letter of understanding, and (c) allow all voices to be heard and balance dialogue and discussion.

Dedicate resources. I suggest having a dedicated person to assist the team members (and organization) to reach their potential. Such a person would be familiar with both self-management and self-organization. This resource person would work as a choreographer to help change the conversations by seeking to alter prevailing narratives and discourses and, thereby, support the emergence of different ways of thinking and acting (Bushe, 2014). This person's purpose would not only include self-development but also acting as a resource to help team members better understand expected behaviours, assist with developing an environment of trust,

and enhance Imaginea's culture of accountability, which, in the findings, participants expressed a desire to address.

Write a team charter or letter of understanding. In addition to a resource person on hand who could help Imaginea reach its full potential, team members could make an immediate, impactful action that would address the need the participants identified for structure within the teams, while still honouring role flexibility that team members value. I suggest that the Imaginea team members implement a process similar to Morning Star's CLOU, as described by Hamel (2011; see also Appendix I). The Imaginea document that would be negotiated between team members could outline a personal mission statement answering "What's the value you want to create for your peers?" (Hamel, 2011, p. 7). In addition to the personal mission statement, the document could define process stewardship, commitments, and performance metrics that have been negotiated between colleagues who are most affected by the individual's work. This process is in line with the findings, conclusions, and literature, which supported the participants' desire for structure designed to clarify individual functions.

Further, it was stated in the conclusions that participants revered the flexibility they were granted in creating their roles, yet expressed a desire to understand fellow teammates' functions and experience better. The Imaginea document could serve several objectives. Establishing boundaries, function clarity, and accountability could all be addressed in the Imaginea document. In addition, the document would give transparency, where team members have a centrally defined function in the company, allowing them the opportunity to take on more significant responsibilities as they develop their skills and gain experience. The process of building the document is aligned with self-managing principles and would be a further opportunity to collaborate and show leadership, as its development would be self-led.

Allow all voices to be heard and balance dialogue and discussion. In addition to the providing role clarity, the research participants spoke positively about the learning circle method itself, in that they were able to voice an opinion without interruption. By applying a dialogic mindset to this research project, the literature highlighted the importance of "attending to, listening to, and including marginalized or excluded voices as critical for innovation in a diverse world with a complex array of factors, influences, and stakeholders" (Bushe & Marshak, 2016, p. 45). I suggest that Imaginea be more purposeful in giving space to allow all voices to be heard. By amplifying the untapped wisdom in the organization, new ideas, processes, and solutions would emerge (p. 42).

As new spaces are created and new voices are welcomed into the conversation, having the ability to harness the energy associated with different opinions and capitalizing on Imaginea's diversity will be crucial. I suggest that Imaginea increase the connection opportunities and communication between those who share the same projects. Learning to balance dialogue with discussion, Imaginea has an opportunity to increase the connection. These connection opportunities are where complex issues can be explored. Senge (2006, pp. 230–231) explained that teams who regularly enter into dialogue, where different views can be presented, created a level of deep trust amongst the team. Further, when teammates held their point of view gently and were open to influence, profound group learning emerged (Senge, 2006).

Recommendation 3: Institutionalize success stories: Find ways to share success stories—however small. Sharing success stories is a form of role modelling—a pattern for others to learn the same mindset and behaviour. Supporting the culture with a meaningful platform by which positive stories are shared would reinforce the company's strong beliefs and values and establish new or enhanced norms to support the organizational structure.

Success stories are a great source of inspiration for others to excel, while helping to strengthen the team and allow co-workers to become more familiar with one-another. The findings demonstrated that participants spoke passionately and with excitement when given the opportunity to share a success story. To further support participants' desire to understand fellow team members' functions, having a forum to share success stories openly not only gives teammates the opportunity to show appreciation and gratitude to their fellow team members, but it may also lead to increased motivation by inspiring them to contribute more to the team while reinforcing the meaning of one's hard work.

Cooperrider, Barrett, and Srivastva (1995) suggested that how things are framed and talked about becomes a significant, if not the most significant, context shaping how people think about and respond to any situation. Therefore, what any particular group believes is a reality, truth, or the way things are is created, conveyed, and changed through mental models, stories, narratives, and other symbolic interactions. Through the shared stories, a new organizational reality will start to unfold as old ways of thinking are contested and new possibilities emerge.

Recommendation 4: Onboarding—Continue with the current practice of ongoing improvement. The findings showed that onboarding was a valued process. Further, it was discovered that a new onboarding process was being rolled out with input from previous experiences. This continuous enhancement mindset is aligned with self-management. Chris Rufer, CEO at Morning Star (as cited in Hamel, 2011, pp. 57-58), estimated that it can take a new employee a year or more to become fully functional in a self-managing organizational structure and acknowledged that not everyone is suited to survive in the organizational model. To help identify new hires who are better suited for self-management and to further aid the

onboarding process, I suggest that Imaginea continue to seek out favourable self-managing hiring practices that exceed traditional hiring processes.

To help build the environment of trust that is required in a self-managing organizational structure and identified as mission critical to the success of the company in the findings, I suggest that after three months, new hires be invited to write an open letter of gratitude to teammates. The letter would identify a moment when the new hire felt welcomed and a part of the team and organization. In a similar vein, current employees might write a letter of gratitude to teammates through a narrative that illustrates an incident or project in which the team function aligned with Imaginea's vision and values. By taking an appreciative approach, Imaginea would give focus to behaviours that they want to grow (Lewis, Passmore, & Cantore, 2008, Chapter 2, "Belief in the Power of Appreciation," para. 4). Further, Fredrickson and Branigan (2005) offered empirical support, demonstrating that positive emotional states are associated with more socially oriented behaviour, greater curiosity and exploration, and greater willingness to accommodate ambiguity or uncertainty.

In addition to the letters of gratitude, as the team members at Imaginea continue to enhance both the hiring and onboarding process, consider opening the onboarding process to all employees. In the findings, a few participants noted that they had little onboarding. Opening up the process would ensure that messaging is consistent and would allow team members to be part of a process if they choose. Further, to aid the process of acculturation and to continue with inclusivity, I would invite the Imaginea team to consider partnering new employees with a co-worker outside of their team who has demonstrated an advanced knowledge of the system and is available to answer questions or provide direction until the new hire becomes more self-independent.

Recommendation 5: Commit to self-development and learn the art of feedforward.

The findings demonstrated that Imaginea offers an abundance of self-development resources. The resources explicitly discussed in the findings included the various personality profiling exercises, access to personal development material, and coaching. In the findings, it was established that the resources offered to the Imaginea team members are underutilized. There is an expectation that team members inside a self-managed organization acquire the training, resources, and cooperation required to fill their functions. Companies that have successfully implemented a self-managing organizational structure admit that productive self-management rarely happens spontaneously (Laloux, 2014b, Part 2, Section 2.2, No boss, para. 2).

Hackman (2009, p. 766) listed "actively seeking data and feedback to learn how well [you] are doing accomplishing [your] task" as a desired self-manager behaviour. Team members need a process to know if their performance is in line with expectations, and they are, therefore, contributing to a culture of continuous improvement. Goldsmith (2015) criticised traditional feedback loops for focusing on the past, stating that it can be "limiting and static" (para. 2). Instead, Goldsmith offered a new approach called feedforward, where suggestions for the future that would make a positive difference in the recipient's life are shared. Feedforward is more in alignment with the Imaginea structure and values. By offering suggestions that help people focus on a positive future, on ideas that are aimed at helping them achieve their goals, and reinforcing the possibility of change, the experience is viewed positively by both the recipient and the giver of the feedforward. Senge (2006) stated, "Organizations learn only through individuals who learn" (p. 129). By committing to self-development, while teaching and encouraging the ongoing process of feedforward, the Imaginea team would be better equipped to maximize its organizational structure.

In summary, these recommendations were constructed from the findings and conclusions gathered from the thematic data analysis presented in Chapter Four and supported by the relevant literature. Both the implications involved in applying the recommendations and the risks associated if Imaginea continues without intervention need to be addressed.

Organizational Implications

The recommendations offered provide suggestions that would enhance the organizational structure. If implemented, the organizational model could emerge stronger, encouraging an increased commitment to the self-managing structure.

The next step for this project is to present the results of the study back to the Imaginea Team. This research report will be saved on an Imaginea internal public drive and available for all team members to review. Team members can leverage this project by taking an active role in effecting positive change: demonstrating an interest in the inquiry findings, conclusions, and recommendations and creating opportunities where results can be discussed.

As my sponsor and CEO of Imaginea, Suzanne West was updated from time to time on conclusions, recommendations, and various literature relevant to the inquiry; this research project became a living piece of Imaginea's self-managing organizational structure. Part of what makes a self-managing structure effective is participants' authority to implement recommendations offered up in the learning circle immediately. Participants' commitments to take action to effect positive change had started to surface in behaviours during the inquiry, which included seeking out understanding of each other's roles and listening more attentively. In addition, interviewees commented on actions already in motion that had been discussed in the interviews. The dialogic process was purposely chosen for this research project, as the technique complimented the culture at Imaginea and allowed them to self-organize as a result of socially

constructed realities that were created through narratives and shared stories (Bushe, 2014, Chapter 10, Change Processes in Dialogic OD section, para. 2). I have offered to review the findings, conclusions, and recommendations to all stakeholders if the opportunity arises.

The broad scope of this project and the findings that overlapped across the themes demonstrated the interrelatedness of the conclusions. The systemic nature of the research became evident through noting the interconnectedness: By addressing one conclusion, the impact would be felt across many of the other themes. For example, by addressing role clarity, value discrepancy, and expectations around shared leadership, conflict may decrease. By taking a holistic approach and addressing all the recommendations in an integrated manner could optimize the change initiatives.

Another implication for implementation lies in dedicating time and resources. The findings revealed that training is required to generate and maintain a self-managing organizational structure successfully. Therefore, to optimize successful implementation of the recommendations, dedicated resources and allocated time would be required. In addition, because an overwhelming majority of team members at Imaginea have previous work experience in top-down, command-and-control work environments, employing someone knowledgeable in self-managing systems to guide the company would be an asset.

The stakeholders identified the organizational model as a topic to further explore, which created the basis for this research project. If the recommendations are not implemented, which relate mainly Recommendations 1 and 2 that concentrate on the deeper understanding of the organizational model, Imaginea may not reach its full potential. However, as Imaginea is a self-managing organizational structure and the participants in this study demonstrated self-managing behaviours, it is possible that the team members would have uncovered the findings themselves

in their own time and in their own way, or they are sufficiently aware and resilient of being able to adapt. By beginning to implement the recommendations immediately, Imaginea would be in a better position to maximize their collective wisdom and unleash the creativity and innovation they so desire, thus aiding them in reaching their vision. To further enhance this research project, implications for future inquiries have been identified.

Implications for Future Inquiry

Through the interviews and the learning circle, the participants offered rich and diverse data to inform the research questions. Due to the broad scope of the inquiry questions, I focused on areas that would provide the most significant impact on strengthening the organizational model, thus increasing commitment to the self-managing structure. However, there is more room to explore the individual themes in greater detail. Findings, conclusions, and recommendations were generalized in this research project. More in-depth study of each theme would provide greater clarity and direction to Imaginea. In this section, I outline some more specific themes that could allow Imaginea not only to continue to strengthen their commitment to the organizational model, but also begin to maximize the self-managing organizational structure.

This inquiry project revealed an extensive amount of material on the topic of self-managed teams. An additional inquiry dedicated to exploring successful self-managing teams would assist Imaginea with Recommendation 2, Learn about self-managing teams. This would allow for a more fruitful interpretation and application of the literature. Subtopics could include discovering successful implementation strategies, more in-depth understanding of required behaviours, greater awareness of the barriers to full implementation, and what is required to assist and coach the team to success.

The second opportunity would be an inquiry dedicated to capitalizing on diversity to maximize collective wisdom. Imaginea believes in employing the whole person. They encourage diversity, agility, and disruptive thinking. Imaginea wants team members to bring not just their skill—the part that went to school or learned a trade, but also the whole person, thus bringing their creativity and brilliance (W. Pohl, personal communication, November 21, 2017). Researching and discovering tools to help Imaginea unleash the opportunity that presents itself through diversity would be beneficial by tapping into a more comprehensive knowledge base, thus enhancing organizational performance.

The third productive inquiry suggestion would be to study existing excellence in self-managing organizations and their onboarding process. West (personal communication, June 9, 2017) spoke about a need for team members to enter the merge lane when starting at Imaginea. Although the Imaginea team is dedicated to improving the onboarding process, by understanding what has been successful in other self-managing organizations, Imaginea could adopt and adapt best practices to meet their own needs.

Report Summary

As the team at Imaginea navigates its way through to the full adoption of a self-managing organizational structure, this research project celebrates the work that has been done, while offering stakeholders' recommendations that focus on the future. Using an appreciative stance and through a dialogic process, a "container" was provided to the stakeholders through one-on-one semi-structured interviews and a learning circle, where they were encouraged to share their stories and narratives. These narratives, stories, and perspectives were analyzed and themed. The results yielded three major findings, five conclusions, and five recommendations. Although a few recommendations offered tactical solutions, the ones that will have the greatest leverage

focused on fostering conditions that will lead to new ways of thinking and better outcomes (Bushe, 2014). In honour of Imaginea's self-managing organizational structure, by offering recommendations that allow for emergence could create ownership in the solutions. Zimmerman et al. (2013) defined ownership as those doing the work developing the ideas, making decisions, and designing and acting on the plans (p. 8).

It has been my pleasure to work alongside the Imaginea team throughout this project, engaging in enlightening conversations about the literature, and addressing insightful questions while relishing in the many comments. It is my hope that Imaginea can make use of the findings, conclusions, and recommendations offered in this report as they continue to evolve their self-managing organizational structure. As an outside researcher, I am excited about Imaginea's possibilities for the future, and I look forward to continuing to watch Imaginea evolve.

~The journey [to self-management] is worth the effort. At the end, you'll arrive at an organization that is highly effective and deeply human~

(W. L. Gore, as cited in Hamel, 2011, p. 7)

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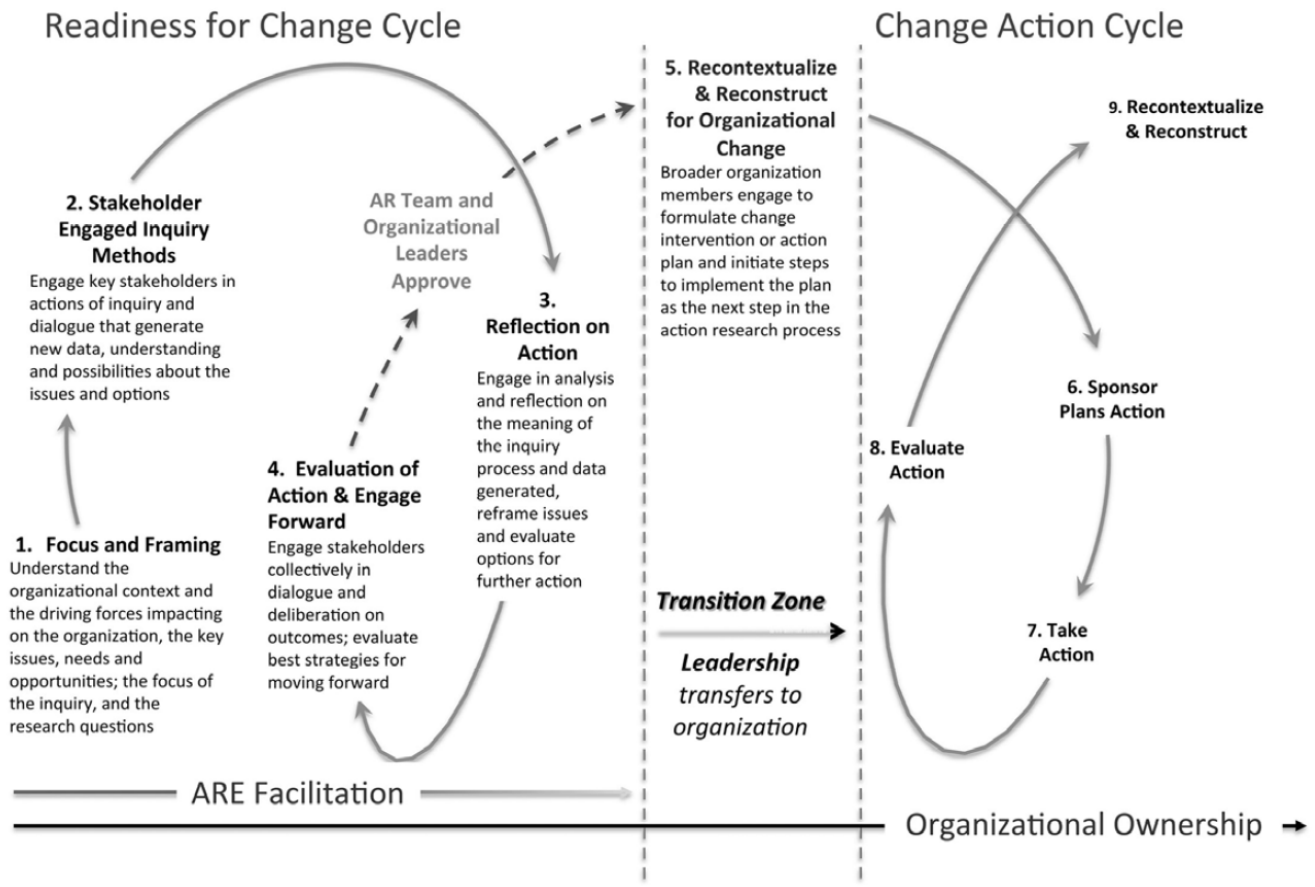
Appendix A: Action Research Engagement (ARE) Model



Source: *Action Research Engagement: Creating the Foundation for Organizational Change* (ALARA Monograph Series No. 5, p. 20), by W. Rowe, M. Graf, N. Agger-Gupta, E. Piggot-Irvine, & B. Harris, 2013. Copyright 2013 by Rowe et al. Available from https://supestore.sydney.edu.au/jspcart/cart/Product.jsp?nID=902&nCategoryID=1

Appendix B: Inquiry Team Member Letter of Agreement

In partial fulfillment of the requirement for a Master of Arts in Leadership Degree at Royal Roads University, Rebecca Greenan (the Student) will be conducting an inquiry research study at Imaginea Energy to explore how might a dialogic process help Imaginea Energy strengthen its commitment to a self-managing organizational model. The Student's credentials with Royal Roads University can be established by contacting Dr Catherine Etmanski, Director School of Leadership Studies at [phone #] or emailing her at [email address].

Inquiry Team Member Role Description

As a volunteer Inquiry Team Member assisting the Student with this project, your role may include one or more of the following: providing advice on the relevance and wording of questions and letters of invitation, supporting the logistics of the data-gathering methods, including observing, assisting, or facilitating an interview or learning circle, taking notes, transcribing, or analyzing data, and helping the Student and Imaginea Energy with the change process. In the course of this activity, you may be privy to confidential inquiry data.

Confidentiality of Inquiry Data

In compliance with the Royal Roads University Research Ethics Policy, under which this inquiry project is being conducted, all personal identifiers and any other confidential information generated or accessed by the inquiry team will only be used in the performance of the functions of this project, and must not be disclosed to anyone other than persons authorized to receive it, both during the inquiry period and beyond it. Recorded information in all formats is covered by this agreement. Personal identifiers include participant names, contact information, personally identifying turns of phrase or comments, and any other personally identifying information.

Personal information will be collected, recorded, corrected, accessed, altered, used, disclosed, retained, secured and destroyed as directed by the Student, under direction of the Royal Roads Academic Supervisor.

Inquiry Team Members who are uncertain whether any information they may wish to share about the project they are working on is personal or confidential will verify this with Rebecca Greenan, the Student.

Statement of Informed Consent:

I have read and understand this agreement.

_____ _____ _____

Name (Please Print) Signature Date

Appendix C: Stakeholder Interview Questions

Main Inquiry Question:

How might a dialogic process help Imaginea Energy strengthen its commitment to a self-managing organizational model"?

Sub questions:

1. What attracted you to come work for Imaginea Energy?

2. Can you tell me a story about a positive and successful experience that you have had with the self-managing organizational structure?

3. If you can imagine Imaginea 1-2 years from now, how do you envision the organizational structure and where do you see yourself in it?

4. What does the organizational structure look like to you when it is working in its most optimal form?

5. Imaginea's vision is "*We want the same thing you want. An energy industry that's much better for the planet, and for people, and for profits*"? How do you see the organizational model helping the company reach this vision?
    a. If you are not sure, would you be able to articulate why a self-organizing structure would be beneficial in general terms?

6. Can you tell me a story of when you felt empowered at Imaginea Energy?

7. Among the unique processes and practices to Imaginea Energy, which ones do you enjoy the most or which ones do you feel are important to continue developing in an effort to enhance a self-managing organizational structure?

8. Of all the processes, which ones have been the most beneficial to you that have assisted you in accomplishing both your personal and corporate goals?

9. I would like to talk about personal values for a moment, can you tell me a little about your values and what is important to you as a human being?

10. Would you like to share any additional information that you feel is relevant or helpful to the study?

Appendix D: Invitation to Participate in an Interview

[Date]

Dear [participate]:

My name is Rebecca Greenan, and I would like to invite you to participate in a research project I am conducting. This research project is part of the requirement for a Master of Arts in Leadership Studies at Royal Roads University and is sponsored by Suzanne West, President and CEO of Imaginea Energy. My relationship to Royal Roads University is an outside researcher and not an employee of the organization. My credentials with Royal Roads University can be established by contacting Dr Catherine Etmanski, Director School of Leadership Studies at [phone #] or emailing her at [email address].

Purpose of the study and sponsoring organization

The purpose of my research project is to explore how to strengthen commitment to Imaginea Energy's self-managing organizational structure through determining what beliefs, strategies and practices have proved to be successful.

Your participation and how information will be collected

This part of my research will consist of a semi structured one-on-one interview. The interview is anticipated to last one hour, and it will be audio recorded; however, it will be summarized by themes without using names in the final report. The audio file will be transcribed, and you will have the opportunity to review the transcript. The anticipated questions include asking about current practices at Imaginea Energy that support a self-managing structure. The data collected from interviews will be used to identify themes and contribute to recommendations contained in the final report.

Benefits and risks to participation

This project is intended to promote capacity and, thus, the questions and conversation are explored in an appreciative and positive manner.

Sharing results

In addition to submitting my final report to Royal Roads University in partial fulfillment for a Master of Arts in Leadership degree, I will be sharing my research findings with my Inquiry Team and Academic Supervisor. A summary of data findings and major themes will be shared with the President and CEO of Imaginea Energy. All data will be combined by themes, without using names to protect the identity of all participants and Imaginea Energy. Imaginea Energy employees will have access to inquiry final conclusions and recommendations, which will be saved to the Imaginea public company drive.

By replying directly to the e-mail request for participation you indicate that you have read and understand the information above, and have agreed to participate in this research study. To

ensure that you give your free and informed consent to participate in this project, you will be asked to sign the “Interview Consent Form”.

Please feel free to contact me at any time should you have additional questions regarding the project and its outcomes.

Please keep a copy of this information letter for your records.

Thank you!

Rebecca Greenan

[email address]

[phone #]

Appendix E: Interview Consent Form

[Date]

My name is Rebecca Greenan, and I would like to thank-you for agreeing to participate in a research project I am conducting. This research project is part of the requirement for a Master of Arts in Leadership Studies at Royal Roads University and is sponsored by Suzanne West, President and CEO of Imaginea Energy. My relationship to Royal Roads University is an outside researcher and not an employee of the organization. My credentials with Royal Roads University can be established by contacting Dr Catherine Etmanski, Director School of Leadership Studies at [phone #] or emailing her at [email address].

Purpose of the study and sponsoring organization

The purpose of my research project is to explore how to strengthen commitment to Imaginea Energy's self-managing organizational structure through determining what beliefs, strategies and practices have proved to be successful.

Your participation and how information will be collected

This part of my research will consist of a semi structured one-on-one interview. The interview is anticipated to last one hour, and it will be audio recorded; however, it will be summarized by themes, without using names in the final report. The audio file will be transcribed, and you will have the opportunity to review the transcript. The anticipated questions include asking about current practices at Imaginea Energy that support a self-managing structure. The data collected from interviews will be used to identify themes and contribute to recommendations contained in the final report.

Confidentiality, security of data, and retention period

I will work to protect your privacy throughout this study. All information I collect will be maintained in confidence with hard copies (e.g., consent forms) stored in a locked filing cabinet. Electronic data (such as transcripts or audio files) will be stored on a password-protected or encrypted computer. Information will be recorded in hand-written format and audio taped, and, where appropriate, summarized in anonymous format in the body of the final report. At no time will any specific comments be attributed to any individual unless explicit permission has been obtained beforehand. All documentation will be kept strictly confidential. Raw data will be held for one year; at which time it will be destroyed.

Procedure for withdrawing from the study

You are not required to participate in this research project and may withdraw at any time. If you choose to withdraw prior to completion of the interview, your recording will be deleted and any data collected will be excluded from the inquiry. However, once transcripts of an interview have been sent back to participants for approval and signed off confirming accuracy and intention, I will no longer be able to remove recordings as they have become part of the data analysis process.

By signing this form, you agree that you are over the age of 19 and have read the Letter of Invitation to Participate in an Interview for this study. Your signature states that you are giving your voluntary and informed consent to participate in this project.

☐ I commit to respect the confidential nature of the interview by not sharing information about other participants.

Name: (Please Print): _____

Signed: _____

Date: _____

Appendix F: Learning Circle Questions

Main inquiry question:

How might a dialogic process help Imaginea Energy strengthen its commitment to a self-managing organizational model?

Participant questions:

1. I invite everybody to share with the circle what attracted you to come to work for Imaginea.

2. I invite you to share your most memorable experience you have had that is related somehow to the self-managing organization model. It could be about yourself, or something that you witnessed. Something that happened at Imaginea that was allowed to happen, that you feel would never have happened in a traditional hierarchical company.

3. When you look into the future and see a work environment where everybody is filled with enthusiasm and energy; where everyone is using their talents to the fullest and seems incredibly alive; what are the processes or practices that are either in place right now at Imaginea or you would like to suggest, (maybe they need to be expanded or added) in order to make this future a reality?

4. What do you think is one shift in attitude or action that you could take today that could potentially move yourself or the company towards the future reality; a reality where everyone is using their talents to the fullest and seems to be incredibly alive?

5. I would like you to share your top one or two things (besides those wonderful people that you get to work with every day), that you love about Imaginea. What makes you look forward to coming into work every day?

6. As a check-out, I invite you to share with us something that you heard today that you will take away as your primary learning and please feel free to share anything else that you want to about the organizational structure.

Appendix G: Invitation to Participate in a Learning Circle

Date [date]

Dear [participant]:

My name is Rebecca Greenan, and I would like to invite you to participate in a research project I am conducting. This research project is part of the requirement for a Master of Arts in Leadership Studies at Royal Roads University and is sponsored by Suzanne West, President and CEO of Imaginea Energy. My relationship to Royal Roads University is an outside researcher and not an employee of the organization. My credentials with Royal Roads University can be established by contacting Dr Catherine Etmanski, Director School of Leadership Studies at [phone #] or emailing her at [email address].

Purpose of the study and sponsoring organization

The purpose of my research project is to explore how to strengthen commitment to Imaginea Energy's self-managing organizational structure through determining what beliefs, strategies and practices have proved to be successful.

Your participation and how information will be collected

This part of my research will consist of a learning circle. A learning circle creates a collaborative field where people can contribute to and influence the organizations they work in. The circle gives each person a chance to be heard without interruption and is a practice of meeting together (www.thecircleway.net). Up a maximum of 10 participants will be included. If more than 10 respond positively to the (email) invitation, an additional learning circle will be added. If oversubscribed (> 20 candidates), a random draw will be held to fill all positions.

The learning circle is anticipated to last up to 90 minutes, and it will be audio recorded; however, it will be summarized by themes in an anonymous format in the final report. Learning circle data (including audio recordings) will not be identified by individual. Participants may withdraw at any time, however, I will be unable to segregate individual data including audio recordings and therefore all data will be included in the analysis process. The anticipated questions include asking about current practices at Imaginea Energy that support a self-managing structure. The data collected from the learning circle will be used to identify themes and contribute to recommendations contained in the final report.

Benefits to participation

This project is intended to help employees of Imaginea share their experiences and ideas, and come to a better understanding about how the organization might move forward. All questions will be framed in an appreciative and positive manner.

Sharing results

In addition to submitting my final report to Royal Roads University in partial fulfillment for a Master of Arts in Leadership degree, I will be sharing my research findings with my Inquiry

Team and Academic Supervisor. A summary of data findings and major themes will be shared with the President and CEO of Imaginea Energy. All data will be presented in an aggregated and anonymous format to protect the identity of all participants and Imaginea Energy. Imaginea Energy employees will have access to inquiry final conclusions and recommendations, which will be saved to the Imaginea public company drive.

By replying directly to the e-mail request for participation you indicate that you have read and understand the information above, and have agreed to participate in this research study. To ensure that you give your free and informed consent to participate in this project, you will be asked to sign the "Learning Circle Consent Form".

Feel free to contact me at any time should you have additional questions regarding the project and its outcomes.

Please keep a copy of this information letter for your records.

Thank you!

Rebecca Greenan

[email address]

[phone #]

Appendix H: Learning Circle Consent Form

[Date]

Dear [participant]

My name is Rebecca Greenan, and I would like to thank-you for participating in a research project I am conducting. This research project is part of the requirement for a Master of Arts in Leadership Studies at Royal Roads University and is sponsored by Suzanne West, President and CEO of Imaginea Energy. My relationship to Royal Roads University is an outside researcher and not an employee of the organization. My credentials with Royal Roads University can be established by contacting Dr Catherine Etmanski, Director School of Leadership Studies at [phone #] or emailing her at [email address].

Purpose of the study and sponsoring organization

The purpose of my research project is to explore how to strengthen commitment to Imaginea Energy's self-managing organizational structure through determining what beliefs, strategies and practices have proved to be successful.

Your participation and how information will be collected

This part of my research will consist of a learning circle. A learning circle creates a collaborative field where people can contribute to and influence the organizations they work in. The circle gives each person a chance to be heard without interruption and is a practice of meeting together (www.thecircleway.net).

Confidentiality, security of data, and retention period

I will work to protect your privacy throughout this study. All information I collect will be maintained in confidence with hard copies (e.g., consent forms) stored in a locked filing cabinet. Electronic data (such as transcripts or audio files) will be stored on a password-protected or encrypted computer. Information will be recorded in hand-written format and audio taped, and, where appropriate, summarized in anonymous format in the body of the final report. At no time will any specific comments be attributed to any individual unless explicit permission has been obtained beforehand. All documentation will be kept strictly confidential. Raw data will be held for one year; at which time it will be destroyed.

Sharing results

In addition to submitting my final report to Royal Roads University in partial fulfillment for a Master of Arts in Leadership degree, I will be sharing my research findings with my Inquiry Team and Academic Supervisor. A summary of data findings and major themes will be shared with the President and CEO of Imaginea Energy. All data will be presented in an aggregated and anonymous format to protect the identity of all participants and Imaginea Energy. Imaginea Energy employees will have access to the inquiry final conclusions and recommendations, which will be saved to the Imaginea public company drive.

Procedure for withdrawing from the study

You are not required to participate in this research project. Learning circle data (including audio recordings) will not be identified by individual. If you choose to withdraw prior to completion of the learning circle, due to the nature of the group method, I will be unable to segregate your raw data from the audio recordings.

The learning circle is anticipated to last up to 90 minutes, and it will be audio recorded; however, it will be summarized or aggregated in an anonymous format in the final report. The anticipated questions include asking about current practices at Imaginea Energy that support a self-managing structure. The data collected from the learning circle will be used to identify themes and contribute to recommendations contained in the final report.

By signing this form, you agree that you are over the age of 19 and have read the Letter of Invitation to Participate in a Learning Circle for this study. Your signature states that you are giving your voluntary and informed consent to participate in this project.

☐ I commit to respect the confidential nature of the learning circle by not sharing information about other participants.

Name: (Please Print): _____

Signed: _____Dated _____

Appendix I: Morning Star' Self-Managing Organization Structure

Morning Star Company, a global market leader, is the world's largest tomato processor, employing over 400 full-time employees and has had double digit annual growth in volumes, revenues, and profits over the past 20 years (compared to 1% per year by its competitors). Morning Star brings in over $700 million a year in revenues and handles between 25%-30% of the tomatoes processed each year in the United States. Morning Star believes it is the world's most efficient tomato processor and epitomizes the self-managing organization structure.

In keeping with self-management principles, Morning Star employees are responsible for drawing up a personal mission statement that outlines how he or she will contribute to the company's goals. To provide a formal process to define and allocate roles, Morning Star team members negotiate a Colleague Letter of Understanding (CLOU) yearly with associates who are most affected by his or her work. This document defines commitments, authority, and performance metrics, while remaining fluid and adaptable. In essence, the CLOU is an operating plan for fulfilling one's personal mission. The CLOUs morph from year to year to reflect changing competencies and shifting interests.

From: Hamel, G. (2011). First, let's fire all the managers [Reprint R1112B]. *Harvard Business Review, 89*(12), 1–12. Retrieved from http://whispersandshouts.typepad.com/r1112b-pdf-eng.pdf