How do I generate my living-theory of caring in the restructuring of a Carer's Centre?

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Abstract

I am a CEO of a Carers' Centre charity and in this paper I am researching my influence in the restructuring of the Centre. Within this context, the paper explores the generation of living-theories of care giving (Hutchison, 2013) using a values based approach which aimed to listen to staff, provide staff with open and honest feedback and adjust the restructure to meet the feedback received. The paper evidences how I moved from being a living contradiction to living my values as fully as possible as explanatory principles in the process of the restructure (Whitehead, 2008). I have been influenced by Dadds' and Hart's (2001) ideas on 'methodological inventiveness' which stresses the importance of practitioner-researchers generating their own methodologies for exploring the implications of their questions and by literature on transactional analysis Berne (1964) and Theory Y McGregor (1960). Hutchison's (2013) living-theory of care giving in which individuals seek to live their value of care-giving provided a unique analytic framework which includes the clarification and communication of the individual's expression of 'care-giving', with digital visual data and empathetic resonance (Huxtable, 2009).

The contribution to knowledge is in the living-theories of care-giving with the explication of the unique ontological values of care-giving that are expressed by each practitioner-researcher in the course of the enquiry.

My research findings have shown the process of restructuring is difficult for people leading to loss of trust, closed communication, increased inter team tension and splitting (Fugate, 2008). Despite this we have found the final outcome has seen many have a renewed commitment to the organisation, greater sense of purpose and an increase in positive energy.

The Methodology

Before telling the story of my research I am going to explain the methodological framework. I will describe living-theory, my use of this methodology in this paper and responses to the weakness.

I am using a living-theory methodology which encourages methodological inventiveness (Whitehead, 1989, 2008; Dadds and Harts, 2001). This has several key characteristics which sets it apart from traditional forms of research. The first is that it is concerned with the 'I' which in itself is not unique as many methodologies are based on self-study (Tucker, 2011). However, I would argue the key difference to other first person research is it is not an egotistical 'I' but as 'an ethically driven form of research where the educator recognises and takes responsibility for the contribution they make to the quality of the educational relationship, space and opportunities' Whitehead and Huxtable (2012, p. 1). In a living-theory methodology the writer's values emerge in practice. These values are what the writer holds themselves to account by as 'living standards of judgement' rather than imposed standards of judgement (Charles, 2007). In addition a living-theory is interested in the learning of the individual doing the research, the learning of others and the learning of social formations (Whitehead and Delong, 2014). To ensure the research does not harm humanity the final and important characteristic of a living-theory methodology is that the research is concerned with the flourishing of humanity. This can be summarised as 'individual researchers must transform themselves through being prepared to take personal responsibility for contributing to human flourishing' (Whitehead, 2012 p. 4).

'Values are used as explanatory principles in explanations of educational influence' Campbell et al. (2013). My values are love, hope, justice and participation and I hold myself to account to these living standards of judgement. In my Living-theory of Care Giving (Hutchison, 2013) I explore in depth the type of love I am meaning. The love I am referring to is not romantic or sentimental but a powerful force of compassion and action to improve another's life for the better. Hope is not merely wishful thinking but an active ability to hold space open for better possibilities. Justice is not the cold legalistic justice but acting to ensure that people are treated fairly and right. Participation is not asking people to nod through what you have said but to actively engage them with shaping and changing the world for the better. These are my standards of judgement for my research and give the context

to my story and my learning, the learning of others and the learning of social formations for the flourishing of humanity.

Living-theory can be criticised for a lack of objectivity as the methodology takes a values based approach. However, to reconcile this weakness in the methodology I have worked with a concept adapted from Habermas (1976) of having a 'validation group of peers with a request that they help me to strengthen the comprehensibility, truthfulness, rightness and authenticity of the explanation' Whitehead (2008 p. 108).

The story of my learning throughout the restructure

In the context of a living-theory methodology I will explain the story of the restructure which I have been researching and how my values have emerged as explanatory principles. To help the reader, I have added headings as my values were negated and then emerged in practice.

My role

My role is as a CEO of a Carers' Centre for a small unitary authority for over four years. I am working in an environment 'where Governments are downsizing and privatizing due to fiscal pressures on budgets and due to a recognition of the limits of the state as a deliverer of social services.' Austen (2000 p. 69) Under my leadership the Centre has gone from an income of £338,582 and 8.7 full time equivalent staff in the year 2009-10 to £591,000 13.9 full time equivalent staff in the year 2012-13. During 2013 we had another growth spurt and took on the Young Carers Service due to being successful in a tender for the contract of the service. Our success made us more than double the size of the organisation when I began. At this point we began to have some staffing related difficulties which resulted in a senior manager leaving and some negotiations taking place. As a result it looked like we were unlikely to meet our contractual obligations if we did not make some significant changes. I realised that our structure was not fit for purpose and needed a more serious overhaul than the organic expansion we had been doing with the new contracts we had been winning.

My Values negated in practice

As a CEO I try to live my values in practice and hold myself to account to the values of love, hope, justice and participation (Hutchison, 2013). However, we had a reduced senior management team which meant I was working to cover lots of roles and was feeling tired and too busy. Both these states make me less able to

consider others and their needs and less able to hold space open for better possibilities. I felt the legalistic sense of justice had taken over due to the employment law we had to work under and I felt I was not able to treat people fairly but just in a defensive way to protect the organisation under the law. Finally I felt I was not including people because there were things that were confidential meaning staff could not participate. I felt I was entirely living outside of my values and a living contradiction (Whitehead, 2008). On top of that I was feeling bruised as I felt I had made a number of mistakes and wanted to make sure they did not happen again.

Re-emergence of my value of Participation

I began by getting help from someone I felt shared my values and had the skills I lacked, a consultant that was well known to the field of Carers' Centres and had helped a number of other Carers' Centres with restructures and working with the other Senior Managers. I started out feeling my job was to fix things and began by putting a lot of pressure on myself to make things better. However, we spent time thinking critically about ways we could restructure the organisation. It soon became clear that I did not want to approach a restructure from the traditional top down approach or even worse by bringing in a consultant that does all the dirty work and can be blamed when everyone is unhappy as in Theory E (Beer & Nohria, 2000) I wanted to get back to living my values in practice and realised that it was ok that I did not have all the answers. I needed to get back to my value of participation (Heron & Reason, 1997). I wanted to talk to every member of staff to find out what everyone felt was needed to make sure we got things right. This meant I moved from trying to find the answers to planning how to ask the right questions to find out what the team wanted and trying to make sure the new structure fit what the staff suggested (Todnem, 2005). I was able to take the pressure off of myself to find all the answers and move to listening to the solutions the team provided and work out how to meet those. This not only fitted with my values but also meant I could be much kinder to myself. This was not a smooth transition but it was an important one and meant the final structure was able to meet the whole team's requirements, not just the senior management team (MacLure, 1996 p. 283).

'Dialogue can (a) provide a communication based understanding of the complex social construction processes of organizational life, (b) direct the evaluation of existing organizational forms and activities, and (c) provide guidance for the education of members and the redesign of organizational structures and practices.' Heath et al. (2006 p. 369). Therefore, as part of the process it was key that there was dialogue and communication with the team. This began by providing written updates that were emailed to everyone to communicate on a regular basis. This

continued throughout, however the change in approach was to have a dialogue where staff were asked to feedback to their line manager and also to have a day to talk through what staff wanted to happen. The day was a significant time for staff to feedback but it also meant the team needed to feel all their comments were valuable. I was impressed that people were very honest and that they were highlighting the same issues I was feeling about the organisation. They were voicing in their feedback that the organisation was not in line with their values of putting carers first. I was able to agree with this and use their feedback as a way of putting carers back at the centre of our work and making sure the restructure strengthened this ability.

Some of the team fed back that they felt that not all the senior management team at the team day were serious about listening to them. This led to more difficult conversations and more difficult decisions and more refining of how the restructure was taken forward to ensure the whole team were listened to and their views taken into account. Whilst this was difficult I felt sure of what I was doing because I was holding myself to account to my values to ensure that the process was judged by whether it met my living standards of judgement not of standards imposed upon me.

Re-emergence of my Value of Hope

When we looked at all the feedback, the Deputy CEO felt that not only should we look at the feedback to shape the restructure but we should also provide full feedback on how each point was addressed in the restructure. I felt this was a really significant part of how we took forward the restructure and that this approach to giving this feedback transformed the process from something the Senior Management were doing 'to' staff to something the Senior Management Team were doing 'with' staff (Heron & Reason, 1997). Through the process we were able to be explicit about the opportunities for staff to develop their careers enabling us to hold space open for better career possibilities and for a better run Centre which met staff hopes. This shows evidence of my values of hope emerging more fully in practice as the restructure went on and developing as an explanatory principle of my research.

Re-emergence of my Value of Love and Justice

Full information on all the jobs in the organisation, how they fitted together and how much each person was paid was given to everyone, so everything was open and transparent. This was a relief to me as much of the HR processes are confidential. It was important in the restructure to have everything decided and

the information given to everyone at the same time. This gave staff the opportunity to see the possibilities for the Centre improving for the better in keeping with their feedback. By providing full information I was aware this would reduce stress as people would be clear about the change and the reasons for the change. This enabled me to live my values of love by ensuring people's well-being through the process and working to reduce uncertainty and stress (Fugate et al., 2008).

During this private process when we were unable to tell staff the detail of what was happening as there was still so much to be decided. I tried to ensure I did communicate that there were more jobs than people and that our intention was not to lose anyone in the process but to ensure everyone had a pay rise however small. I was evidencing living my values of love and hope through my communications by holding space open for better possibilities. I had thought this would completely reassure people, however, what I learnt was that people find change so difficult that it does not matter how positive the change might be people still struggle and find it stressful as in the cycles of grief (Kubler-Ross, 1973). I found this particularly confusing as I am very aware that in the current economic climate it has meant most charities have been cutting back and making staff redundant or reducing hours or wages or both or indeed closing altogether. This meant I needed to learn to be sensitive to the fact that every point of change people would be finding hard. As a leader I am constantly changing things, this is largely because I work using a living-theory methodology where I ask questions of the kind 'How can I improve what I am doing?' By asking these types of questions if there are improvements to be made these lead to changes, this means that rather than staying the same to make people comfortable we change as an organisation to improve, however, this has the knock on effect of making people feel uncomfortable and sometimes stressed just by the process.

In order to live my value of love more fully I learnt that people need to be supported through change and one of the key ways is to give them as much information as possible. When it came to presenting the restructure we had a full team meeting with a document giving the feedback to all the comments from the consultation on how we had addressed these through the restructure, a picture of the new structure with all the pay scales and intended qualification levels and every job description in the organisation. This meant a lot of paperwork but it also meant everyone had all the information they needed to understand the change. This shows evidence that through the extra work I was holding myself to account to my values of love, hope, justice and participation and they were developing as explanatory principles of the restructure. The documents showed our intentions to go beyond the minimum and give as much information as possible (love) so staff understood what had changed due to their participation, that everyone had a fair

pay scale (justice) based on their role that new opportunities were available to everyone (hope).

No Smooth Process

This meeting was a real high for us as Senior Managers and the consultant. We decided we would only ask the consultant to present the theoretical information about what a restructure is and what we were trying to achieve. We wanted to give all the messages to the team ourselves as senior managers so they knew they were from us not from a consultant we could later scapegoat. The staff were initially excited as the restructure had met their key hope; a request for career progression. As senior managers and the consultant we left the meeting feeling great whilst recognising that the next stage was much harder for the staff than for us. We had lunch together to review how things went and were pleased with the meeting and the response of the team. Everyone except two gave the restructure a thumbs up and the two that did not said it was ok but they had reservations.

This felt like the work had been done at this point, but in fact we had to remind ourselves that although we had done a huge amount of work we had just got to the start of the restructure and everything else had been merely preparation.

The initial excitement staff showed became more complex as staff had to decide whether they would go for promotions as in order to not make anyone redundant we needed three staff to move up into Senior Officer posts. We were sure this would be possible as a recurring theme in the consultation was the opportunity for career progression. However, this did make pressure for people to decide whether to go for posts:
• in case they thought they may lose their job if no one else went for a promotion.
• staff had to compete against each other which caused a lot of tension and heart ache as the team was a close knit team and in some ways had been able to hand responsibility to the senior management team, this restructure was very clear it was about devolving responsibility.

Again I learnt a huge amount. I thought the one scenario that would be difficult was for those that went for positions but did not get them, but what I learnt was that it was hard for everyone. It was hard for:
• those who did not go for it and had to question why they weren't pushing themselves; did they not believe they had the skills; why did not they have the ambition.

- Those that did not go for Senior roles were still concerned who would get the roles and were therefore anxious about how they would get on with their new line manager.
- Although everyone had a pay rise, people who did not go for promotions had the feeling of being demoted because they perceived themselves as moving lower down the organisation even though their jobs were still at the same level or sometimes higher.
- The roles were being more defined, which was something people were very keen to see in the consultation, but in some ways this was reducing their autonomy.

Those who did go for it and got the job were also very anxious as they were concerned about how their peers would take them giving them instructions and being responsible for them. We were very clear that extra training would be in place to help those staff taking on new line management responsibility.

During the recruitment phase I learnt that we had been so focussed on getting everything ready to present the team that we did not give enough time for staff to digest everything and to apply for the positions they wanted. We asked them to do a paper exercise which would set them up in their new role which was to prepare one side of A4 with a SMART team plan for the team they were applying to be Senior Officer of or indeed the teams if they went for the Senior Manager role. This had the benefit of getting them to write their team plan which would benefit them when they started their role as well as giving us a way of scoring the candidates. In hindsight we did not give enough time and this meant we weren't showing enough concern for their well-being meaning I was not living my value of love fully in this process. We could have given the marking criteria to help and been clear that the length was important as it was very hard to mark something fairly if they gave in much more of than one page. It was also clear that it was very hard to give enough information in one page and that two pages would have been better. All these things made it harder for both the staff applying and for me and the team scoring the applications. However, the scoring was done as fairly as possible and three people were chosen showing evidence I was living my value of justice in this process.

Again this was not simple as people had to overcome their concerns about change before deciding whether to take the role. I wanted to let people know as soon as possible and phoned them out of work hours which caused some people distress. Again in hindsight it would have been better to have given ourselves more time to make the decision and let people know and give them time to make the decision once they heard if they had been successful. Again I underestimated how difficult people found change.

Learning Together

Once people were in post we set aside three days of training and decided to do this together as a senior management and senior officer team with the same consultant that had helped us with the restructure. I felt this was important as the consultant understood the values we were keen to work to and the difficulties we had previously had in the organisation. By having the training together it showed that we were keen to work together rather than act as if senior managers knew everything. This was really important and helped us learn together. The key things that helped me was being clear that we need to understand that management is not about carrots and sticks which Theory X based on Taylor's (1911) view of rewards at work suggests. Rather it is about making an environment where people can thrive and excel in which the manager is there to support this and assumes people are self-motivated as in Theory Y (McGregor, 1960). Theory Y mirrors my findings (Hutchison, 2011) which identified people wanted me to:

1. Enable staff to be creative.
2. Have a holistic approach to maintain staff's well being
3. Have a nurturing approach to help staff grow
4. Create an enjoyable environment
5. Turn negatives into positives
6. Appreciate people
7. Listen to People
8. Involve people and be open to critique and change

I have tried to incorporate this into my practice and it was affirming that Theory Y as an established theory also identified these areas as important.

Transactional Analysis (TA) (Berne, 1964) is a theory which recognises people can play games when interacting with each other and play a role to gain a response. TA describes the way people behave as three ego types. The child who can either be playful and fun or moody and rebellious, the adult who is calm and consistent or the parent who is either nurturing or critical. I found this useful to think about how to help people most effectively at work; how to challenge and be aware when behaviour is unhelpful and how to bring it back to being constructive. This helped to think about how as managers we can affect people's behaviour depending on how we react, i.e. if we are critical we may cause staff to react as a rebellious child. However if we keep in adult and are calm and react reasonably it can bring people back to talk calmly as an adult back or cause them to leave because they

are not getting a reaction back but come back later recognising they were unreasonable. This model has limits as people can behave in more complex ways; however as a tool to deal with difficult behaviour and encouraging helpful behaviours in the workplace I found it a helpful tool and feedback from the session showed other staff did too.

It was interesting doing this training with people I also line managed as I was able to learn how people perceive me. The Deputy CEO who I have line managed since he began identified that he now realised that the reason he liked being line managed by me is that I stay in adult, he said I am calm and consistent and treat him as an adult and give him the trust and flexibility to get his work done as he chooses. I was pleased to hear this as I think I am like this, but I also feel this is because he stays in adult and is reliable and can be trusted to deliver or to prioritise where there are issues with workload.

I found the training useful to prepare for and reassure the staff that I was there to support them in the concerns they had in their new roles moving forward and that I was there to support the restructure to succeed showing my values of love for them in practice. I enjoyed being able to be back in a place where open and honest discussions could take place again which staff reflected they also benefited from in the feedback from the session.

Final Stages

The final stages of the restructure were recruiting new staff into role. I was able to bring in my learning from previous experiences to improve the rigour of the recruitment. We use an innovative recruitment model for our Senior Management that the consultant had introduced to the Centre and which I have been through. The process involves the candidate interviewing key stakeholders to get a picture of the organisation which the stakeholders scored in this recruitment, as previously we had not scored this part but used it to inform the decision, we had learnt this did not give enough input into the decision and was hard to make this part of the process meaningful. The latter parts of the interview included a written test which we designed in house, a presentation on their business plan and a formal interview where the panel asked questions which they had agreed beforehand. By scoring all parts and averaging the scores it helped to show the overall view and this was in agreement with the interview panel's decision. Although there were individual differences in opinions these were outweighed by the fact that one candidate came top overall and affirmed the decision to take on this candidate. We had agreed if there was no consensus we would go back out to advert as we knew how important all the roles were.

For the Senior Officers a more simplified process was used which did not include the stakeholder panel, however, carers and young carers also participated in the recruitment to ensure the candidates were also favoured by the people who give the Centre its purpose and meaning (Robson et al., 2003). In the case of the Young Carers Officer the young carers' scores made the final decision as the panel was fairly tied on two candidates which shows the participation of carers not to be tokenistic but actually one of a decision maker.

The next phase of integrating new staff held its own challenges and I have learnt that whilst I was keen to check the candidates would be able to perform in the job as this had been a previous problem now this has been verified there is a need to ensure time is given for building relationships across the whole team not just those areas directly in their job role. This will enable love to be a value across the organisation. I have also learnt that as things change it continues to be difficult as people continue to struggle with change and that although it is hard my focus needs to ensure the structure is fair and right for the whole team and not to make exceptions for individuals.

Conclusions for my Learning and How my Values Re-emerged as Explanatory Principles

In my learning I have used the concept of change leadership where I have started from my practice 'to figure out what's working, what could be working better, and then look into how research and theory might help' (Fullen, 2011 p. xii). During the restructure I have held myself to account to my values which I named at the beginning of the paper as love, hope, justice and participation. During this paper I have shown through my story of the restructure how these values have emerged as explanatory principles even though I started from a place where I was not living my values.

Learning of Others through the Restructure

I have learnt from people's feedback by reflecting on what they have said and trying to incorporate this into my practice and in order to help me with my learning and to understand the learning of others I have videoed conversations. These are with a staff member who was promoted to the Senior Engagement Officer post, the Deputy CEO who was the Senior Manager that worked throughout the process, and the Consultant who supported us through the process. I have identified the key learning from each video conversation and checked my

interpretations with the people involved and where I have ethical permission have shared a link to the video:

Senior Engagement Officer

Video 1. https://www.youtube.com/watch?v=csbQ-etcsKo Video Conversation with Senior Carers Engagement Officer at 18:15 showing an empathic resonance and energy (Huxtable, 2009).

Senior Carers Engagement Officer's Learning identified through the video:

1. What a restructure really means and that it has a big physical, emotional and psychological impact because of the huge change.
2. Change is really challenging, stressful and creates anxiety and that however strong a team is that process will be hard to go through.
3. Everyone is different and that although it is frustrating some people react badly and don't want the change to happen and can threaten the stability of the whole organisation.
4. Difficult to manage and cater for each person's need and therefore management need to help prepare people more for that process and difficulties.
5. It was the right thing to do and although it's taken time to find its feet it has been a positive thing to do.
6. Needed more time to apply for the new roles.
7. Appreciated being given a ball and allowed to run with it and that engagement is something he is good at, can do and enjoy which is good on a professional level.

8. Misses aspects of his previous job - the one to one connection with carers and so has set up doing a carers assessment to keep that connection to remember why he is doing the job.
9. He has the ability to progress - did question if he could do this, if he wanted to do this.
10. Found it has been a positive move professionally and personally even though change has been a challenge.
11. He has a mantra things do not stay the same they are continually changing
12. We are busy organisation and he does put pressure on himself to do everything - this is a pressure point so it's important to know he cannot always do everything.
13. Been able to grow in and out of the organisation which has been great because they've gone hand in hand.
14. Key is to make sure people identify carers and offer them all the amazing things the organisation offer for free,
15. When organisations don't get it he feels he's letting carers down.
16. Sometimes feels he's drowning under paperwork which is frustrating as he wants to be helping carers.
17. People's personalities come to the fore when they are put under such pressure such as a restructure.
18. However brilliant the team is it can go belly up and although he got frustrated with people it's good not to be judgemental of people or not take on their negativity. It's really important people feel safe to be themselves and can say how they feel in a professional environment even though it's a challenge.
19. Being a manager is not about being bossy and tell people what to do and point your finger - as soon as he realised it's not about that and saw it from his team member's point of view it went really well.
20. Found the parent – adult - child ego useful to think about what he's being.

Consultant

Consultant's learning identified through the video:

1. Process was about how to do a restructure that moved from a management led, systems based, structural thinking into process led, value based, organic thinking.
2. Allowed a real collaboration where everyone has to do their bit and each member needs to be coming from the same perspective to ensure that change is not impositional but is about how we do this collaboratively.
3. Explored intention and outcome and moved away from I did it, to, I did something which worked well and we all played our part.

4. Different people brought something different. Consultant -the skills and confidence, Sonia - her leadership and values, Deputy CEO - the time and desire to write up the feedback which was a really pivotal point.
5. importance of giving this feedback in written form because it's one thing to go to a room and talk and be told you've been heard but it meant something else for everyone to see what they had said and the responses next to it to validate that they had been heard and to physically see what had been done as a result.
6. The approach improved the performance of the organisation enabling every major promise to funders and carers to be delivered once the restructure was put in place.

Deputy CEO

Deputy CEO's learning identified through the video:

- That we were not prepared enough to manage the fall out that came from people being promoted from within and that we need to be much more prepared for this in any future opportunities.

Conclusions from the Learning of Others

I feel whilst the learning of others show the difficulties of the process overall there is also evidence of a renewed commitment to the organisation, greater sense of purpose and an increase in positive energy from the points they raise. Evidence for the Senior Carers Engagement Officer are in points 5, 7, 9, 10, 13, 18, 19 and 20. For the consultant all the points show evidence. The Deputy CEO focuses on the learning we still have to do.

The learning of Social Formations

The learning from this paper has learning that is of use to social formations. Other organisations in similar situations will benefit from reflecting on their values and using a values based approach into a traditionally process driven activity of a restructure. I feel the research I have done looking at the learning and impact of the restructure and honest reflection can bring a more positive experience for other organisations entering into a restructure. Organisations will benefit from our learning that being more transparent and more in touch with the feelings people have when experiencing change improves the process. A key learning is that living values as fully as possible and making them explanatory principles improves the process and the outcomes of a restructure.

Conclusion

In this paper I have used a living-theory methodology which has placed my values as central as they re-emerged through the process of a restructure in the charity I lead. The paper shows my learning, the learning of others and the learning that is applicable to social formations. I have engaged with literature on organisational change and added a unique contribution to knowledge in this area as I have evidenced the benefit to the process and outcomes when values are used as explanatory principles.

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