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Contemporary Research Topics

flexible learning 4

November 2019

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flexible learning 4:
Change Strategies

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Contemporary Research Topics

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IDENTIFYING EFFECTIVE CHANGE STRATEGIES IN COMPLEX AND DYNAMIC SITUATIONS

Dr Lesley Gill & Dr Ehtasham Ghauri

One of the constants we experience in life is the flux of change. Change affects us in varying degrees; sometimes gradual and anticipated, sometimes radical and unpredictable, but always life-changing. Change draws out different responses and reactions in us, as areas of our 'normal' life are impacted. Our thinking, emotions and actions are in involved sometimes in harmony and sometimes discordantly with the change. During a time of change, we are likely to experience grief; leaving behind or letting go of something that was comfortable and predictable, to embark in a new direction; often into the unknown. Some people handle change with optimism and a sense of adventure while others find change daunting and exhausting, and something to be resisted.

Typically, change that occurs incrementally occurs within defined stages as part of the natural evolution of circumstance and situation. In contrast, radical change happens as a result of a major or catastrophic event that dramatically shifts the conventional axis of normal activity, usually with a *fait accompli* with no-return to the status quo.

The theme of this Scope edition *Change Strategies* has drawn a wonderful variety of perspectives on change, change management and transformation, with a focus on the process of changing from one state to a better or higher one. Several of the articles highlight culture, employee welfare, leadership, effective communication, and collaboration as elements of change.

Other articles tell the story of the journey of change, articulating key success elements that contribute to successful change outcomes. Key themes are keeping it real, changing our thinking, and using empathy when supporting people through change.

Another submission addresses the importance of the actions of 'one' which can be the force that leverages collective momentum for change as well, while another considers the use of technology to transform business practice and so rethink efficiency, production, services, and development from the ground up.

Yet other articles address how changing one's perspective can change customers' overall experience, and how applying a lens of human resource management offers ways of ensuring effective systems that value people.

This edition of Scope considers change strategies from many perspectives at a time when change is a predominant theme within business, education and our personal lives.

REFLECTIONS ON PERSONAL AND ORGANISATIONAL CHANGE

Phil Ker

As individuals, we can choose to accept the challenge to respond positively to change. Individuals who recognise that change is the norm will be better placed to minimise stress and make the most of opportunities. As organisational leaders, we must not forget that organisations are comprised of individuals, each with their own attitudes towards change. There are some fundamental principles for organisational change which will maximise the chances of success. There must be clear expectations for staff, clear alignment with strategy, and a reward and recognition strategy that reinforces the desired behaviours. Organisations must also empower staff with the capacity and capabilities to change, and resources must be allocated for this.

Figure 1. Scripting Change

It is a cliché for sure, but if there is one constant in life, it is change. At a personal level, some of us thrive on it, some of us do our best to avoid it and others experience considerable anxiety and stress whenever change presents. At the very least though, as individuals we must learn how to cope with change, lest we lead the most miserable of lives.

For organisations, they either engage positively with change or it is forced upon them - as consequences of ever developing technology and societal shifts, which often relate to or derive from those technological advances. However, changing what organisations do and how they operate is a major challenge in its own right. Success requires the people who make up the organisation to embrace the desired changes. How can organisations influence individual behaviour so that essential change can be coped with at least, and preferably embraced?

As individuals we can choose, to a considerable extent, how we react and respond to change, and how we cope with it. I am reminded of the story told by a graduating high school student addressing her colleagues. "We were out on a hike, the heavens opened up and the rivers rose quickly. We were trapped between two now raging streams. We had a choice: stand in the rain and be drenched and miserable, or stand in the rain." Being miserable was the

optional bit - the choice to be exercised. For sure, some people are wired to exercise the 'miserable' choice, but we can train ourselves not to do so. This is a personal challenge, but one to which we can all rise.

So, what can we do to make the most of change, and to minimise the stresses associated with change? We can take personal responsibility for our thoughts and actions. We can look for the positive in the situations which confront us, and we can choose to use positive language. We can minimise the negative people we allow into our lives and we can surround ourselves with positive people. We can make ourselves see the world through the eyes of others who are much worse off than us, and we can help others with their issues and problems, which is an inherently positive activity. We can engage actively with the changes going on around us, rather than reacting to them. We can reassess and let go of unrealistic expectations of self and others, which are often cause of anxiety, and we can forgive ourselves and others for the mistakes which are inevitably made, thereby creating space for more positivity.

What about producing change in organisations? This is a much more complex challenge because organisations are comprised of individuals, all of whom control their own thoughts and attitudes; by definition, change in organisations means people changing their behaviours - which they can choose to do or not.

There are some basics for organisational change, which if followed will maximise the chances of success. Undoubtedly, first, staff must be receptive to change, and this will only be the case if there are compelling reasons for them to change – reasons which are well understood. Next, staff must actually want to change, which will be more likely if they understand the 'what' and 'why' of change and also the implications - how will they be affected and how will they be expected to behave differently? What are the benefits and disadvantages and, on balance, will they be better off given the alternative of no change?

Receptiveness and willingness to change will not, however, be sufficient. Staff must also have the capacity and capabilities to change – time as well as skills and knowledge - so resources must be allocated for staff training and development, and not as a one-off fix. Once staff have, or are confident they will have, the skills they need for change, implementation can proceed with a greater probability of success. Implementation requires clarity at all levels and the alignment of strategy, organisational and team plans, and individual job descriptions. Accountabilities for new behaviours must be clear, with consequences for not travelling in the agreed direction.

We can see the interplay between personal and organisational attitudes and approaches to change. Organisations that forget they are actually comprised of individuals, each with their own attitudes to change, will struggle to bring about change regardless of how necessary the change might be. Individuals who fail to recognise that change is the norm will likely be destined to a work life from which they struggle to get satisfaction.

Organisational change is notoriously difficult to bed in, with old behaviours waiting patiently to take over again. So, reward and recognition systems must be aligned with the new expectations, and successes should be widely celebrated; the stories of good practices and great results can be extremely powerful.

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THE PEDAGOGIES OF BECOMING: THE CASE OF SUPERVISOR-SUPERVISEE INTERACTIONS IN A MASTERS OF PROFESSIONAL PRACTICE PROGRAMME IN NEW ZEALAND

Behnam Soltani

METHODOLOGY

The guiding research question of this study was: How do a supervisor and supervisee construct a sense of belonging in their community of practice? In order to answer this question, the researcher used an ethnographic approach (Wolcott, 1994) to examine the interactions of the supervisor with his supervisees. I had multiple incidental encounters with the supervisor from March 2016 to October 2017, and interviewed him once formally. I took field notes as I observed him interact with his supervisees including the focal student in this study from March 2017 to June 2017 approximately four times a week from one to two hours per day. I then focused on one particular supervisee and interviewed him twice about his experience. Then I checked my interpretations with the supervisor and that supervisee. The interviews were semi-structured initially but became open ended as the participants chose to discuss the relevant topics about their experience. The interviews were recorded using a digital recorder and then they were transcribed. Transcriptions were checked with the participants for accuracy. The data were analysed using discourse analytic methods (Gee, 2013). The researcher's observation notes were reviewed multiple times. Then, the interviews and the observation notes were triangulated (Geertz, 1973) that allowed for the credibility of the findings. The supervisee was a Pakeha Master's student and his supervisor was also Pakeha, who was doing a PhD himself at the time of study. The program of study was a Master of Professional Practice (MPP hereafter) in a tertiary institute in New Zealand. Otago Polytechnic Human Ethics Committee granted ethics approval to this study.

FINDINGS

In the subsequent sections, the overarching themes emerging from the data are analysed.

CO-CONSTRUCTION OF A SHARED MEANING

My observations of the supervisor-supervisee interactions and then the interviews with both the supervisor and the supervisee demonstrated that they co-constructed a shared meaning due to their previous life and work experiences, interests, and establishing rapport early on in the program. In this regard the supervisee pointed out:

The whole area of understanding and rapport we built very early in the piece was essential to me one feeling comfortable but also feeling challenged at a level. [Name of the supervisor] was actually able to challenge me not only at a base one level but also the future thinking model as well (Interview data, May 2017).

The supervisee had an industry background and later in his career decided to pursue his lifelong interest via a Master's degree. His supervisor having an almost similar background was instrumental in building a meaningful relationship which he not only felt comfortable with but at the same time found challenging because he particularly was anxious about whether or not the supervisor was able to make sense of his writings (Interview data, May 2017). Along the same lines the supervisor mentioned,

I think [name of programme leader] in choosing me as [supervisee's name] mentor was intuitive completely. She is intuitive in that she realised that me and [name of the supervisee] came from the same backgrounds and I think we had shared interests. But more than that I think there were other synergies. The fact that I am doing my PhD studies and I am also very passionate about learning, and naturally with my background, I realised that we share an awful lot in common because I have a rigorous scientific background myself and my industry was a high tech industry and I was very conscious of high tech development and what it entailed and how it came about (Interview data, May 2017).

As demonstrated above, the supervisor and supervisee co-constructed a shared meaning due to the fact that a) they both had industry experience and later on in their career had pursued their academic endeavours, b) had vested interest in the learning process, and c) established a rapport with each other which was instrumental in their mutual interactions. All the above conditions facilitated the emergence of a community of practice (Wenger, 1998) wherein both supervisor and supervisee engaged in dynamic processes by means of participating in and contributing to a joint creation of meaning, knowledge and understanding situated in their tertiary institutional context. Although in the case of the focal participant in this study, the background of the supervisor and the supervisee were similar (i.e. they both came from a Pakeha cultural and linguistic background and both had industry and academic experience), the data from the observations confirm that the supervisor managed to establish shared meanings with his other supervisees who were of international backgrounds through their everyday interactions.

MUTUAL INTERACTION IN A DYNAMIC CYCLE OF REFLECTION AND ACTION

The narratives of both the supervisor and supervisee show that the MPP journey was a process in which the two parties engaged in dynamic reflection and action. In this regard, the supervisor mentioned,

This process helped me to understand the power of facilitation model …And through that process we quickly realized that it wasn't just a development journey for [name of supervisee]. It was also a very interesting development journey for me. The best way I can describe it was this concept of staircasing each other where I say one thing and it has ramifications for how [name of the supervisee] then thinks and then he says something back to me which staircases me into another dimension (Interview data, May, 2017).

And, along the same lines, the supervisee indicated,

What I like about it is, that when we discuss things, it's sort of like, as we evolve, we evolve still keeping to the subject matter, because it is really easy to have a disjointed conversation that stimulates all of those sorts of things, but I think we evolve towards a point and you know, the snowball increases in velocity and volume as we head up the hill, so we go up to higher learning as we go and it actually grows bigger and bigger and you kind of look at those things and go, wow it's pretty cool (Interview data, May, 2017).

As seen above, the supervisor used the metaphor of 'staircasing' to stress his pedagogical underpinnings by placing a strong role in creating a learning space where the supervisee could enjoy the same power relation as himself. Likewise, the supervisee used the metaphor of 'snowball' to show that he together with his supervisor enjoy the same power relation and so seamlessly build up each other's knowledge in a collaborative way. They both used

the metaphors of staircasing and snowball to show that the relationship was a multi-sided, dynamic, continuous, ever-changing, and ever-evolving one where the supervisor and supervisee mutually reflected on each other's interpretations. The use of metaphor is significant in the conceptualization of the learning process because metaphors direct the focus away from accounts of the nature of conceptual structures to understanding the discourse context and processes involved (Tay, 2011). Creating learning models through metaphor was instrumental in the supervisor-supervisee learning process as mentioned by the supervisor.

I look at my own model of capability as a process, as a series of cycles which grew out of unconsciously appreciating [the supervisee's name] model of prototype development where again it was a series of cycles. And it was that analogy that gave me the sense of it of what I have come to realize as subsequent learning and I have shared it with [the supervisee's name]. And actually learning and problem solving using the same process. So, research, problem solving and learning are different sides of the same coin. And that is an extraordinary powerful insight I have gained through this process. I think the thing for me which is powerful for [name of the programme] is that [the learning] is very personal but developing the whole person in this journey and allowing each of us because it is not simply one sided, to both gain out of it, and I have gained immensely out of it in my research and learning journey (Interview data, May, 2017).

The metaphor of models discussed by the supervisor above explains how they enabled the two parties to mutually interact with each other and reflect critically on their own learning by taking ownership of their own learning through their independent unique models of learning. During this process both the supervisor and supervisee applied their agency (Ahearn, 2001) by taking control of their learning and appropriating the metaphorical models to their unique learning experiences.

CONSTRUCTING PROFESSIONAL IDENTITIES

The outcome of the MPP programme for both supervisee and supervisor was the construction of professional identities which came about as a result of their everyday interactions. In this regard, the supervisee pointed out,

I am now a pracademic with the practical application and the academic side. That was a revelation to me because that was not somewhere I thought I was before because I was thinking of myself as being one or the other and I was fascinated to read the latest thinking on introverts and extroverts and am now [professing] the profile of an ambivert who has essence of both and I think that is a little indicative of what is happening in the world today. But when I apply that to myself and I look back and see I looked at things very very differently when I started this journey toward the end. It benefits me greatly going to the doctorate programme but I am now also aware how I start my doctoral programme will be very different when I finish and I find that very exciting. I am very much on a journey that I haven't arrived at its destination (Interview data, May, 2017).

The MPP programme as illustrated above shaped the identities of the supervisee so much so that he thought of himself not in binary terms but rather linking all his industry experience to the academic journey he went through with the aid of his supervisor. This process enabled him to reimagine himself by connecting the dots in his lifelong learning experience and seeing a more enlarged image of himself (e.g. I am now a pracademic and ambivert).The supervisor also experienced the same situation as shown below.

I think my engagement with [supervisee's name] has helped me to formulate a model of learning practice for my PhD study. As a result I think I am now confident that I have a significant model for my own learning and a type of learning everyone needs for the 21st century (Interview data, June, 2017).

The above accounts show that identities of the supervisee and supervisor were constructed discursively. This view of identity construction sees identity not as a fixed and static entity and category based on fixed attributes associated with individual, but rather describes it as 'a dynamic construct that may not only develop and change over time but is also context dependent' (Ellemers, Haslam, Van Knippenberg, & Platow, 2003 p.13). The outcome of conceptualizing identities as a social construct is that identities are produced and constructed in local context and in connection to other social agents in our social space (Schnurr & Zayts, 2011).

DISCUSSION AND CONCLUSION

The analysis of the findings from the supervisor's and supervisee's reflections in this case study suggested that supervision is a dynamic process wherein the two parties in their communities of practice (Eckert & Wenger, 2005) a) co-constructed a shared meaning, b) mutually interacted in a dynamic cycle of reflection and action, c) and constructed professional identities. In this relationship, the novice-expert relationship changes (hence the power relationship between them), where at some point the supervisee could be the expert and at another point, the novice.

The relationship between the supervisor and supervisee in this process should not be understood towards producing a final product (Vehvilāinen & Lōfstrōm, 2016) i.e., a big report or a product but rather a learning process through which both the supervisor and the supervisee contribute to the problem, staircase each other and evolve together. In this process, the two parties participated in the supervisory learning space based on their relevant professional experience, reflections at the present time, and their reimagining of themselves in future. The role of the supervisor was then that of a facilitator who regarded himself as a member of that community of practice who promoted a culture of critical thinking in his interactions with the supervisee. The supervisor and supervisee mutually interacted with each other and formed a community of practice and enquiry.

The study also showed the importance of metaphor in representing and conceptualization of academic norms while the supervisor engaged actively with the supervisee during the learning process. The metaphors of staircasing and learning models helped the supervisee's learning and facilitated the acquisition of knowledge, problem solving, and critical thinking skills (Cameron, 2007; Thibodeau & Boroditsky, 2011).

The study also showed that identities of supervisor and supervisee are shaped in the social space as the two in-dividuals interacted with each other, enhanced their capabilities, and learned to reimagine themselves by thinking about new possibilities of being and becoming the person they want to be in the future (Neilsen, 2015; Norton, 2010). In the words of Wenger (1998, p. 215), "Learning transforms who we are and what we can do, it is an experience of identity. It is not just an accumulation of skills and information, but a process of becoming."

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DEVELOPING THE FOCUS OF A HUMAN RESOURCES CATALYST

Callum McKirdy

INTRODUCTION: BEING FOCUSED

BE	DO	HAVE
Insightful	Understand	Greater Empathy
Unattached	Surrender	Deeper Wisdom
Focused	Hustle	Meaningful Progress
Connected	Collaborate	Stronger Connection
Yourself	Believe	True Presence

Figure 1: Be, Do, Have Focus (McKirdy, 2019, p.61)

"When walking, walk. When eating, eat."
– Zen Proverb

Human resources (HR) by its very nature is a strategic leadership function. Yet, not all HR practitioners need to aspire to being strategic. We must all have an appreciation for and awareness of the bigger picture, as well as where and why HR does what it does. What we need to be careful of is that this strategic line-of-sight does not supersede or hinder HR's primary focus of being of service to individual customers each and every day. Sometimes we fight this notion fearing it will dilute or dumb-down HR's positioning. On the contrary, we should double-down on this. In other words, let us influence towards achieving business goals by doing some exceptional work with the people that matter. Essentially, we will have far greater impact as a result of how we go about our work in HR, rather than relying solely on technical nous and trying to constantly position ourselves as experts. That much is a given.

I call the practitioners who take this approach *HR Catalysts*. These are the people in Human Resources who spark and lead sustainable change in others across the business. This is who we want to be as a future-focused profession.

Pivotal to that success is the need for the HR Catalysts to be insightful of their brand of HR and the context in which they operate, and the requirement for them to be unattached to whatever may be holding them back from greater impact. These two dimensions of practice set up and clear the way for the third dimension we will discuss here – that of gaining *focus* in the work you are doing as a go-getting people practitioner.

Being focused is all about getting things done. It is the hustle of the HR world. It needs to happen quickly and, with regard to the HR Catalyst's practice of the profession, it needs to result in meaningful progress. This cannot be fully achieved without first having greater empathy for your customer's context (as we now know it) and having

surrendered potential shackles. Once we know what needs doing and have moved on from potential barriers, we are ideally placed to grab opportunities with both hands.

This dimension is like a rock-climbing technique. To climb efficiently, you need to put effort into your legs. It takes constant self-reminders to use the right technique here. It is all too easy to look at all the options above you, predominantly pull from handholds, and burnout your arms. You need to keep your mind on the best way to do things, not the most obvious. Continuing the rock-climbing analogy, mindset and state management are vital to a successful climb. It would be unfortunate to lose your nerve on a rock-face dozens of metres off the ground. Likewise, HR Catalysts must hold their nerve in the face of challenging themselves. This is less about putting on a brave face and more about setting yourself up for success by learning to manage your state of being in all manner of situations.

In any realm, focus requires persistence, as well as the need to form productive habits. In this chapter we will explore the need for the HR Catalyst to develop habits that reinforce the brand of HR you want to be known for, while amplifying your impact. In particular, this *Focused* dimension requires four distinct areas for the HR Catalyst:

1.   Relentless forward progress

2.   Leading and coaching

3.   Influencing those who matter

4.   Accountability

Persistence and tenacity are noble characteristics that have been held in high regard for centuries. They are also qualities of the HR Catalyst, but they do come with a proviso: stubbornness and an impulse to 'flog a dead horse' are not sensible (or sustainable) approaches for HR Catalysts to take to their work. Indeed, making relentless forward progress is more an outcome of the practitioner's behaviour; not the behaviour itself. The savvy practitioner knows when to stop and take stock of a situation. If a process or project is clearly not gaining traction or making progress, there is no point forcing it. Instead, they know how to quickly assess the situation (be insightful) and decide on a new course of action (be unattached to the old process).

THE ROLE OF HABITS IN FOCUS

Positive habits in your HR practice are vital to achieving a sense of progress. James Clear (2018) notes how small habits can have a surprisingly powerful impact on your life. He likens their impact to a pilot changing course just a couple of degrees. The nose of the plane would move only a couple of feet, with nobody on board noticing a thing, but over the course of a flight from one side of the United States to the other, the plane would be several hundred miles off course. We don't notice these changes because their immediate impact is negligible, but the HR Catalyst looks to develop habits that have a significant return.

Such a habit might be based on incredible customer service, such as scheduling regular times to meet your client and checking-in to see what works best for them. You might ask, at an initial meeting, if it is ok to record the conversation on your phone so you can be fully present and not have to take notes. It is even better if you send the recording to the manager when you follow-up after the meeting, including having already completed some of the tasks you committed to.

To form habits that stick, it requires a process of first needing a cue, which triggers a response (when repeated becomes a routine), which in turn is followed by a reward. Clear (2018) explains how humans are motivated by the

anticipation of the reward rather than the reward itself. We cannot rely on some far-away future goal to keep us motivated in the present. Therefore, a secret to successfully implementing behaviours that drive progress forward, is to make the habit itself attractive.

When trying to build focus as a habit, we also need to be careful our efforts do not get derailed by people or processes. HR Catalysts are mindful that there will always be some level of interference. These can be characterised as either *Tensions, Triggers or Trolls*. It is worth understanding the difference between each, being prepared with some strategies to handle them, and understanding how a shift in your perspective can reduce the number of issues you come into contact with.

Tensions comprise the environment in which you work. It could be issues with the culture or the teams within which you are required to operate. I suspect you are well familiar with how these kind of external tensions feel! Not all of these negative environmental factors are widely known however; many are aspects of the internal environment that affect your ability to practice HR. Some of these tensions may be within yourself – judgements, preconceptions and assumptions you have made that are either unresolved or have recently been highlighted as unhelpful. In which case, you must seek to understand these better and surrender those that do not serve you.

It is important to recognise at this point that not all tension is negative. Focused HR Catalysts recognise that a level of tension is positive in motivating individuals to hustle and do better. Tension raises levels of alertness and awareness, and both are helpful in engaging robust debate. Just as in one extreme we come up against tension that cripples you with stress and indecision, without any tension at all we do not tend to be challenged or incentivised to improve things. It is simply about finding the balance and having the right amount of tension to keep you alert.

Triggers are the aspects of work that either set you up or set you off. Again, like tensions, they can be positive or negative towards your ability to make progress. Triggers reside within you – they are a mindset that has the ability to bolster your self-assurance or tear-down your self-confidence in a matter of words. HR Catalysts master their triggers by surrounding themselves with people and interactions that positively reinforce their values, while steering clear of those that are filled with toxic energy. Obviously negative situations cannot be avoided all the time – this is HR after all, and people behave badly, and it may be your role to deal with such people and scenarios. However, astute HR practitioners have a knack for depersonalising the toxic nature of work and treating work as a game.

Finally, *Trolls* are those people who bring you down – either intentionally or inadvertently. The internet is rife with 'trolls', and so too is the workplace if you let people get to you. Again, the HR Catalysts among us surround themselves whenever possible with people who build them up, rather than pull them down. However, a big part of dealing with 'trolls' is not giving them the chance to exist in the first place. You would be horrified at how many 'difficult relationships' are actually a result of our own misunderstandings, assumptions, and failure to communicate. An HR Catalyst does not make assumptions about a person, they find out what is going on and if they can help. Do this well, and you will find that the number of 'trolls' in your life is greatly reduced.

A response to *Tensions, Triggers* and *Trolls* in your working life is to practice the art of being 'Anti-Fragile', a concept coined by Taleb (2013). Pointing out the term 'fragile' has no opposite in the English language, Taleb wrote about the concept of 'Anti-Fragility' being things that gain from disorder. Traditionally, we consider the opposite of fragile to be strong and hardy, but such strength often means things are brittle. 'Anti-Fragility' means something that genuinely profits or benefits from chaos or stress.

This is a useful concept for HR Catalysts to consider. It is similar to the old expression *what doesn't kill you makes you stronger.* So, at this point, it is useful to ask yourself some more questions about your ability to progress forward:

- How are you practicing in an anti-fragile manner?

- What is your chaos? Is it real or perceived?

- What are your tensions, triggers and trolls at work?

- Describe your resilient characteristics and traits.

- How does your team handle tension, debate and disagreement?

- Unpack a project that has stalled – what are your two critical next moves?

- What is preventing you from gaining further traction in your HR practice?

LEADING AND COACHING

A fundamental premise of the HR Catalyst is that human resources (and the wider people profession) is a key leadership role in any organisation. Those practicing HR should keep this as a practicing philosophy and use it to triage not only the work undertaken, but also the impact you strive to make.

Leadership is a service role and in the case of HR activity this is about creating environments for people to thrive, to be the best versions of themselves, and for the organisation to benefit as best it can from having its people engaged in meaningful work. Everything the HR function does must take the organisation closer to achieving its desired goals. Are we leading the organisation forward with the work we do? Did you lead the HR team in service of the organisation today? As a result of the work the HR team does, is the organisation in a better place today than it was this time last week? At times it can be hard to pinpoint immediate benefit from HR actions, as transformation takes time. It is not HR's role to do the leading for leaders; it is HR's role to enable leaders to lead.

It would be unfortunate to read the above paragraphs and think I am referring to HR leaders as only those in management roles within the profession. The type of leadership I am referring to is about people leaders, programme leaders and change leaders. Delegated authority is not vital for you to lead others, but HR in a sense has delegated that authority by its very nature. The expectation is that HR practitioners lead the better deployment of people and their experience of work. The most junior HR staff member can provide leadership of a process and advice to the most senior manager in the business – what matters is how you are behaving in that moment. How we go about our work of HR allows us to gain greater traction with customers and projects more than what it is we do.

HR Catalysts take the lead on key projects – there is definitely a need for fundamental project management skills in the HR Catalyst's portfolio of skills. Yet traditional project management has been very task and checklist oriented. The HR Catalyst leads projects by empowering others to shoulder the load and thus put new skills into practice. For sure, you will roll up your sleeves and get your hands dirty in the work that needs to be done, but the leadership approach of a HR Catalyst is one where others are empowered and enabled to stretch themselves. After all, you are likely to have multiple projects on the go.

But project leadership is not the extent of the work of the HR Catalyst, and it is here we might have to start developing new skills. Your core skill to develop is your ability to coach others, including leaders and staff at all levels. Coaching involves asking great questions. The best coaches do not provide many answers at all, but rather are great conversationalists who ask the type of questions to elicit a train of thought which sees the person being coached come up with their own answers. Questions that make your customers think about the impact of their actions, the potential for success and what that looks like for their staff, and questions that require managers to imagine alternative scenarios and see their people in a different reality are gold for HR Catalysts to gain greater traction.

The beauty of the HR Catalyst as a coach is that you do not need to be an expert in the topic you are coaching a customer through. (This is different from a mentoring relationship which is one where the mentor has 'been-there-and-done-that'. This is not the case with coaching). You simply need to be an expert at asking great questions that make people think. The only way to get better at coaching is to ask more questions! The deeper you go, the more effective you are, but be careful – it is a fine line and many go too far. This is why HR Catalysts also use their emotional intelligence and self-awareness to great effect.

Coaching effectively takes a good deal of rapport and a solid relationship, so consider the following questions:

- Why is HR primarily a leadership function?

- How can HR amplify its leadership role in your organisation?

- How are you leading HR practice in your organisation?

- What is different about your HR leadership? How do you know it is effective?

- Do you use coaching as a key tool to spark change in others? How?

- Is this part of your HR brand? How would others around you describe you?

INFLUENCING THOSE WHO MATTER

HR Catalysts operate on the premise that they get work done **through** people; not by doing more themselves. To be fair, the HR Catalysts I know and have trained are incredibly hard working and diligent. They are also smart, savvy workers who use the people around them to get things done – they influence those who matter.

First, they have the credibility to influence, which comes from how well others can relate to you. I call this your *Relatability Quotient* (RQ) – it is the measure of how well others can relate to you, plus your ability to make good use of that level of relatability.

Your RQ will get you a long way in your HR career. You will no doubt be aware that organisations are often run by personalities. Some people climb the ladder, while others (perhaps equally as deserving) do not. It is about who you know and who knows you. Note that it is also understandable if, while reading that last point, you recoil and think to yourself "It's HR's role to ensure proper process is followed so this doesn't happen!" Well, yes and no – certainly it is HR's role to champion fairness, but HR Catalysts are under no delusions that a few strong personalities will have influence that outstrips their formal authority. The key takeaway for you here is that it is your role to figure out ways to (a) get on their radar; and (b) influence these people to achieve better outcomes for the organisation – that is get done what you need done. This may mean they take the credit. Let that go.

Second, you need to know who matters. The people to whom you need to relate, to influence at a higher, more effective level, and who you can work with and through to make things happen, are pivotal in creating opportunities you can really invest yourself in and get some great work done. A desire to have a great experience at work as an HR Catalyst does not need to detract from your ability to provide world-class customer service and deliver unbelievable results. So, to create a list of influencers in your organisation and what you know about them – their skills, interests, experiences and aspirations – and tag these alongside projects and initiatives you plan to undertake in the coming months, would be a great move. Again, effectiveness here comes down to the relationship you develop with key individuals and spending meaningful time with them.

Your RQ, and knowing who matters across your organisation, are important things for you to think about, so consider the following questions:

- What is your Relatability Quotient?

- Who matters in your HR practice? Why? Why them?

- How and where could you generate a little more friction in your practice?

- How could you do this in your team and your organisation?

- How easy are you to work with? What do your key customers say?

ACCOUNTABILITY

At this point we are about halfway through the Catalyst HR model, and it may seem odd that accountability only now gets a mention. It is a critical characteristic of operating as a person who sparks change in others across your organisation. It is also something that HR as a profession is not necessarily known for, despite a focus on ensuring *others* are held accountable through performance management frameworks. Yet, we needed to lay the foundations of being *insightful* and *unattached*, or else we would have been holding ourselves accountable to an unattainable and unfiltered amount of work.

Being accountable as an HR Catalyst requires three fundamental opportunities you must take (or create) for yourself:

1. Standing up

2. Stepping in

3. Standing out

Standing up is about exactly that; taking a stand for something. It is about having an opinion and standing by it. This is the first move of HR accountability. It is not about disagreeing for the sake of having your voice heard, but it is about putting your hand-up and being counted. Too many HR practitioners are caught up in pleasing people and saying "yes" to everything, then they wonder why they are not invited to the table. Even if your opinion rubs some people up the wrong way, you are better to have had your say than to shrink into the background and remain silent.

You will need to pick your moments, but if they do not arise then you will need to create moments that serve your purpose by *Stepping in*. HR Catalysts who step into situations, problems, projects and situations (particularly ones that others shy-away from), create moments and opportunities to not only make a real difference, but to change the brand of HR in organisations and even industries. There is a knack to identifying situations that will allow you to leverage your skills versus ones that will see you sink. You need to be able to read the situation well enough to pick your moment, but not dwell too long so that the moment passes. That's called procrastinating into inaction! Stepping in to tricky situations takes courage, but you can receive a huge payback for your efforts. It is in these situations that you stand out from the pack.

HR as a profession is not one known for *Standing out* from the crowd. It has for decades been known merely as the place that gives out hugs and comes down hard on behaviour that discriminates. It is ironic that HR is also widely known as having a "Do as we say, not as we do" attitude. As a profession, HR often stands out for all the wrong

reasons, not least because you can easily find the following examples of HR acting contrary to the best practice it preaches:

- HR advising working around issues rather than addressing what's pressing

- HR getting involved in office politics and seeming more concerned with hierarchy

- HR (rightly or wrongly) failing to be transparent with process and progress

- HR people ironically having trouble seeing the human side of issues

- HR being subjective, rather than objective, and taking sides.

So, the time is ripe for the HR Catalysts among us to take a stand for making change in our organisations as well as in how HR is practiced. To stand up for a challenge and a position that may not be popular can be one of the hardest steps to take in your career, but it can also be the most rewarding.

Have you been standing up, stepping in and standing out in your HR practice? Ask yourselves these questions to take a benchmark of where you are now:

- What does 'standing up', 'stepping in' and 'standing out' look like in your HR practice?

- What would each of these fundamental opportunities look like for you?

- Where in your work could you take on a little more pressure?

- Where in your team could you create and/or apply a little more pressure?

- How do people you work with describe your ability to get stuff done?

- How does your HR practice challenge the status quo?

HR CATALYSTS DON'T WAIT FOR CHANGE TO HAPPEN

Many futurists believe change is not happening faster, we are just reacting slower to the changes around us as the amount of change increases; that the change we see today was set in play a decade ago. Essentially, what we experience now was largely determined in our past. So, what does this mean for the practice of HR? What will be the impact of traditional job disintegration be on HR? The Catalysts among us aren't waiting – they are already creating their future.

It is widely accepted that whole jobs are unlikely to be replaced by robotics and artificial intelligence. Instead, large components of roles will be automated, requiring a partial 'plugging of gaps' required across organisations. The same will occur in HR. Have you thought about where? Have you thought about how you can leverage this coming change, instead of being waylaid by it?

THE ADAPTIVE HR PROFESSIONAL – GAINING TRACTION IN CHANGE

For decades, the Human Resources profession has constantly rebuilt itself on the foundations of the drive for greater employee productivity subject to the industrial imperatives of the day. Over the past 20 years, HR has moved from an enforcer of rules and policy, through a transition from staff satisfaction, to engagement. Now, with a global move away from traditional, full-time employment as the predominant workforce model, the relationship between employee and employer is morphing again. So much so that today the tenets of 'loyalty' and 'engagement' are fading in significance and HR is turning towards the next big thing. Indeed, many believe we have landed on it – it is known as the *employee experience*.

The thing is, whether employee experience is or isn't the next step-change in HR thinking does not matter. What is important is that HR continues to evolve. It is the role of the HR Catalysts to steer this evolution and gain traction with and through change. We cannot avoid change – indeed, this is how the HR profession has remained relevant. The HR Catalyst is at the forefront of the next evolution of the people profession as these practitioners are not only technically savvy, but drive change through how they practice.

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EXPLORING STRATEGIES FOR EFFECTIVE EXPERIENCES FOR EDUCATION AND INDUSTRY

Dr Lesley Gill

INTRODUCTION

In 2019, a learning collaboration document between the DHB and Otago Polytechnic was signed, with the aim of enriching the educational and employment experiences of 25 second-year HRM students studying at Otago Polytechnic in the School of Business, and for strengthening the DHB's staff induction experience. The focus of the shared learning experience was full participation in the actual induction training programme undertaken at the Southern DHB, Dunedin, as well as completing an eight-hour e-learning supplementary component. An induction programme describes the process taken by an organisation to familiarise new or existing employees to their new job roles and the overall workplace (Rudman, 1991). Additional aspects include supporting the new employees to feel a sense of belonging within the work team, to eliminate any 'unknowns' for new employees and for the company to successfully induct the new employee so they can be an effective staff member for the company (Stone, 2013).

The purpose of employee induction programmes is to integrate employees from outside the organisation into the organisation, and so become inducted and acclimatised to their new work environment (Stone, 2013). Through the portrayal of organisational culture from organisational trainers, the sense of organisational identity is enhanced. The advantage of employee induction training is to help new employees adapt to the company environment as soon as possible and enter the job role feeling equipped. In the DHB induction training programme, members of the leadership team introduced themselves and articulated the vision and mission of the organisations as well as explaining their role in the organisation, and offered to help with issues involving the new work place. This way, induction training can reduce the anxiety of new employees (Boxall & Purcell, 2016).

This article presents student perspectives as themed from the data analysis. Findings from the interview are presented along with their recommendations. Conclusions draw it all together and offer direction for future research.

LITERATURE REVIEW

The literature encompasses the benefits of collaborative undertakings, strengths-based learning, on- and off-job training choices, the power of multiple learning platforms such as coaching, and the purpose of induction programmes, including addressing health, safety and wellbeing accountabilities.

Cultivating inter-organisational collaborations

While industry-educational collaborations are not new, the nature of that collaboration has certainly changed over time (Cerych, 1989). Tener (1996) notes the degree to which construction engineering graduates are prepared to perform well in practice is further enhanced by effective industry-university cooperation on such matters as the construction education mission and objectives, curriculum, course content, faculty qualifications and development, resources, co-ops and internships, and other issues. Collaborative strategies have come to include more than knowledge sharing; rather, learning collaborations have taken on significantly more of an experiential application; a hands on grounded approach vis-à-vis traditional teacher-directed training models. Tertiary-industry collaborations provide "insights into corporate issues at an applied practical level" (Beckman, Coulter, Khajenoori, & Mead, 1997, p. 50).

One of the reasons why industry engages with educators is that there is a shared learning philosophy that ensures "equity, inclusion, social mobility, and lifelong learning" (Rusten & Hermelin, 2017, p. 813). It is also an excellent way to build relationships and networks with potential candidates for future recruitment and "efficient strategies to secure a highly qualified and motivated labour force" (Rusten & Hermelin, 2017, p. 823). Trust is a key element of successful collaborations (Leino, 2017). Trust is defined as "the expectation that others can be relied upon, demonstrated through one's readiness to talk about issues with which one experiences feelings of vulnerability" (Gill & Ramsey, 2012, p. 125).

This joint collaboration strengthens industry-educational networks and relationships, and HR processes, creating a win-win for both organisations. This learning collaboration offered students a lived experience of real industry HR processes. It also created a platform for generating feedback on the current induction programme that employees experience when joining the DHB, thus providing authentic insights for the DHB. Additionally, inviting 'visitors' (students) to the induction process gave DHB trainers a fresh perspective of their training programme and increased self-awareness of content and delivery relevance and compliance, as well as giving attending staff a sharpened perspective of their training course. Furthermore, it identified potential HR workers for the future to DHB management and HR staff.

From strength to strength

Historically, teachers tended to address deficits, which "can communicate a sense of failure and helplessness, reinforce low expectations, create dependency on outside resources and agency-created solutions, and discourage individuals from moving in the direction of positive outcomes" (O'Connell, 2006, p. 1). Strength-based learning emphasises deliberate capability development and solution-oriented thinking (Staron, Jasinki, & Weatherley, 2006) and typically is used in restorative justice, children and families; employment; youth, and counselling with the focus of this paper on its application to teaching. Contemporary research indicates learners are responsive to strength-based learning approaches that focus on the positives, strengths and adequacies (Anderson, 2005; Buckingham, 2007; O'Connell, 2006; Waterhouse & Virgona, 2008). An emphasis on achievement automatically improves areas of weakness and addresses deficits inherently without a conscious fear of failure (Buckingham & Clifton, 2001; Fischer, 2006). Henry and Henry (1999) commented that a director of HR at one health care organisation found that a work environment that fostered relatedness, authenticity, and wholeness developed and retained their best employees.

Buckingham and Clifton (2001) noted that 80 per cent of successful managers spend their time on employees' strengths rather than their limitations, underscoring the importance of building on employee strengths. Rath (2007, as cited in Henry & Henry, 2007, p. iii), stated that "people who DO have the opportunity to employ their strengths every day are six times as likely to be engaged in their jobs and more than three times as likely to report having an excellent quality-of-life in general".

On- and off-job training options

Students commented on the advantages and disadvantages of on- and off-job training. Through training, employees can learn professional knowledge and apply it to their work, so that they can better contribute to organisational strategy and processes. In-house training programmes describe learning opportunities developed by the organisation for the organisation. In-house training usually relates to a specific job, for example, how to use certain machinery

or software, and offered by employees with the specific critical expertise. An advantage of in-house training is that it keeps costs down and is flexible enough to meet the needs of the organisation. On the other hand, if outside experts with new ideas and up to date methods are not consulted the organisation may be at a disadvantage in the future (Johnson, Whittington, & Scholes, 2011).

On-the-job coaching is defined as a way to facilitate employee skills training and can be met from within the organisation or outside, and can increase employee effectiveness (Vidal-Salazar, Ferrón-Vílchez, & Cordón-Pozo, 2012). Overall, coaching can foster a more intimate and quicker learning experience for new employees, consequently increasing organisational production and efficiency. The disadvantages of this training surround the individual trainers' capacity to communicate or provide guidance. If the training is happening while both parties are also simultaneously working for example, then the coach or trainer can become distracted and, in this situation, frustrate the new employee resulting in a loss of retention (Vidal-Salazar et al., 2012). The training at the focus of this research was on the job training, although some employees came together from other physical sites of the DHB. This strategy proved useful as it kept the focus on the environment in which the induction training related.

Cultivating team coaching or mentoring: A win-win collaborative learning platform

Team coaching is a powerful training process that promotes the success of teams and organisations. Active team coaching is consistent with a strength-based approach. The foundation of active team coaching has evolved from recognising the complexity of working within teams and building the additional skills and abilities needed to succeed, by focussing on individual expertise that individuals input cumulatively. Active team coaching encourages creativity, builds mutual respect and value, strengthens the team, and accelerates learning (Brennan & Hellbom, 2016). A strength-based approach focuses on the positive aspects of behaviours, as framing training negatively in an employee induction can lead to subconscious negative feelings resulting in employees having a lack of confidence. Removing negatively framed statements will improve employee retention, job satisfaction and make the new employees feel more comfortable in their new working environment (Hiemstra & Van Yperen, 2015).

Similarly, mentoring occurs after an employee has completed induction and in-house training. Mentoring is a method of on-job training tailored to make an employee feel welcomed, as well as, confident while being guide through on-the-job challenges by a colleague with considerable experience (Gibb, 1994). To be effective, mentoring should be part of the organisation's culture. It can be a short- or long-term programme where the mentor and mentee work together in developing the skills of the new employee.

METHOD

Case study methodology underpinned this research. A case study is an extensive examination of a single instance of a phenomenon of interest and gives opportunity to use data that are both descriptive and explanatory (Dey, 1996). The importance of the context (environmental factors – actual and dynamic) is essential. Case studies provide an opportunity for students to "enjoy an active learning experience and derive the experiential payback that such activities offer" (Vega, 2009, p. 574). A case study approach allows for inquiry into the complexities of diverse contexts and processes around a central focus (Dey, 1996).

The study used two research methods: documentation - thematic exploration, and interview. Student assessments based on their experience of the DHB's induction process, were used as a basis of data analysis from a reflective and substantive perspective. An independent marker ensured that there was no conflict of interest and/or breach of ethics. Student work was anonymised before data analysis occurred. The Otago Polytechnic Ethics committee approved this research.

The director of organisational learning at the DHB was interviewed to gain her perspective of the learning collaboration to discover (1) What worked? (2) What did not work? (3) How has looking through others' lens influenced current induction practice? (4) What they might do differently in the future (5) Reflections on learner involvement in their induction process (6) Take home new learnings/ideas/innovations for future induction (7) Advantages and disadvantages of the learning collaboration, and; (8) Something else?

Students attended the induction programme on 19 March 2019 and then used this learning experience to write an assessment (formative and summative report) that met the HR course learning objectives. The student experience integrated e-learning from the DHB training, which meant students reported on their experience of an actual induction programme in a real organisation. The learning collaboration created an opportunity for students' to reflect on their growing knowledge and experience of HR. The design of their assessment offered a format to identify the strengths and weaknesses of this induction process at the DHB, and an opportunity to integrate HR theory explicitly into actual HR practice which in turn created a-ha moments for students. The training experience generated a direct link between 'learning' and workplace practice, making the learning 'real' while also helping students meet and network with employers.

In small groups, students also reported their findings back via a presentation to DHB management. The student reflections and recommendations generated from five student groups were analysed for insights and themes. Reflection is "the practice of periodically stepping back to ponder the meaning to self and to others in one's immediate environment about what has recently transpired" (Cano & Lidon, 2011, p. 525).

DATA ANALYSIS

The opportunity to participate in a real-time live induction process was not lost on the students, in that the staff were valued. Many students also stated how much they felt valued as captured in these comments:

> After attending the induction programme - it made us feel honoured to have the opportunity to be a part of a formal induction.

> The way the DHB treated us during the time of the meeting was very welcoming, kind and considerate which made us feel like we were being inducted into their organisation, which gave us all a sense of self-worth.

> When they asked us to introduce ourselves, I noticed that they were listening attentively, and you could tell when they found something interesting about one of us because of their expressions and reactions were uplifting.

> The DHB's induction programme made us feel privileged as we experienced first-hand what an induction programme is, how it works and what happens. The experience also allowed us to gain access to an E-learning platform that again, we thought was a privilege as we had further information provided to us. We saw this as a fantastic opportunity to gain knowledge for not only our assessment but knowledge for everyday life. The induction programme also made us feel as if we were a part of the team at SDHB, through their continuous use and portrayal of their core values.

A variety of strengths of the DHB's induction programme that students highlighted are:

> Their core values of: Kind; Open; Positive and; Community, described how they expect everyone who works within the DHB to involve these values when working with patients, whanau, colleagues, providers and other organisations, and applied to existing and new employees.

The induction programme presenters did a fantastic job. They engaged with the audience and created an enthusiastic atmosphere, which made the programme a lot more enjoyable.

We were impressed with the Maori welcoming, this showed us that Maori culture is important within DHB and showed us the appreciation they have towards Maori working with DHB and those who will.

As individuals [students] the induction programme taught us new knowledge and reminded us of existing knowledge that has changed the way we view HRM and the way we view ourselves as a person. One thing we all took away as a team was that there is a lot more to managing a hospital than we all thought from the use of security to emergency management that work together to create a safe environment for families, patients and employees. As an HR practitioner, we have gained valuable understanding of what is required to create a successful organisation while mitigating risks and maintaining safety for those involved directly and indirectly of an organisation.

It was quite surprising to hear how many staff members could speak fluent Te Reo.

One of the most important things in a medical workplace is to understand the environment in which the employee will work to ensure the safety of yourself and others (Pollock, 2015). For instance, in the DHB induction, new employees learnt what to do in case of an emergency and training that increased their awareness of health and safety situations. One member of the induction team conducted a presentation about emergency management and specific fire extinguisher use, as well as customer behaviour management, thereby introducing new employees to hazards particular to a hospital setting.

INDUCTION PROGRAMME ANALYSIS

The benefits of running induction programmes before this collaboration was mostly only theoretical for many of the students. Students overwhelmingly commented on how much they appreciated the experience and how much they learned from it. This tangible experience reinforced theory *in* practice for them. One group said:

Before we took part in this induction activity, we did not realise the importance of induction programmes. On reflection, we now believe it plays a very important role. New employees may have doubts about whether they can adapt to the new working environment and job requirements, what their personal development space is, and whether they can integrate into the new corporate culture. Induction training can help employees reduce their psychological discomfort and move them into the job role as soon as possible.

One of the strengths of this programme was the mihi; many of us students felt it was a great way to connect with each other. It set the environment making everyone feel closer and more comfortable. Having the flax activity was also another great interaction; this was one of our favourite parts. It allowed for engagement in the induction process and it seemed to make everyone feel more relaxed and have fun rather than just to participate in a formal occasion.

STUDENT INSIGHTS

Recommendations proposed by students offer the DHB and anyone involved in staff induction and training, fresh insights for undertaking effective induction programmes. This section formed part of their assessment, and does not take away from the exceptional induction programme they experienced.

Firstly, one component of the induction that would enrich the Violence Intervention programme focuses on the impact of the training on the employees personally. The trainer spoke about many issues that could have potentially triggered events for new employees. There was no disclaimer offered be the trainer who started speaking about a domestic violence case. Students suggested the DHB should also provide options for employees to leave quietly and offer support if they become overwhelmed. Students also recommended adding some interactive activities and/or short cases studies to strengthen the learning.

Students recommended having this event in a larger room, which may help create more of a flow so people could have a little bit more space and room to get out and go to the bathroom or to get a glass of water. Perhaps, there could be a short interval towards the end quarter of the induction programme. The addition of 25 more people (the students) contributed to the issue.

Students noticed that a few speakers were going overtime, and did not show consideration to speakers presenting after them by adjusting their own presentations or ensuring they finished on time. This lack of care and concern for others' presentations might point to not living up to their organisational values. Having a short break could also help maintain everyone's attention and concentration.

Nevertheless, students said it was a very informative experience; the speakers were very knowledgeable and communicative which meant there were not many questions asked. The lack of questions might also point to the framing of the invitation, the pressure on time, or the confidence of the employees to speak up in a mixed-group/disciplines setting.

As a future HR practitioner I found it fascinating listening to this induction, I would have been intrigued to learn more about the specific areas of the workplace that they decided to include in the programme.

Overall having the opportunity to attend this induction was a very valuable experience. It gave us the chance to learn a lot more about the DHB and what it aims to achieve in the future, such as: faster treatment for cancer patients, shorter stays in the emergency department and increased immunisation. We had a very enjoyable time and feel more educated after attending this programme at the hospital and online.

We had a delightful experience at the DHB. We gained a lot of knowledge not only in human resource management but also about the Hospital's induction training programme.

INTERVIEW FINDINGS

This section summarises the DHB perspectives of this learning collaboration, and follows the questions posed to the interviewee.

What worked?

Having people other than DHB staff in the training provided new insights of the induction process, uncluttered by the cultural norms of those typically involved in the health sector.

It provided fresh eyes from a learning perspective; people who were there to analyse, not participate (formally).

The presentations were an excellent way of seeing through their [the students'] eyes.

What did not work?

The room. However, it was the biggest training room in the DHB, and adding the students amplified the 'problem'.

How has looking through others' lens influenced current induction practice?

Comments included not having 'information overload' or too much sit-down PowerPoint presentations and ensuring there were adequate breaks.

What might you do differently in the future?

Comments included changing the room set up, check the content such as seeing what values we want to see and what behaviours we do not want to see. Increasing training around 'security' was also an area identified for development.

Reflections on learner involvement in your induction process

The impact of the training with students involved with staff was very positive. DHB managers were very welcoming and relaxed. When asked if they would be willing to do it again, there was a resounding "yes". Follow-up with staff would be useful to gain their perspectives of the joint training event. The possibility for developing modules from the induction process, for example, having other modules on demand i.e., which could be used in relation to Performance Appraisal, Performance Management. A couple of the presenters have already reviewed their presentations. The experience also put "everyone 'on notice' to use best practice". Another insight was that the programme could be more interactive.

Advantages and disadvantages of the learning collaboration

The interviewee said there were no disadvantages. One of the main advantages was to have an opportunity to "learn from each other". Secondly, it was a way of "giving back; paying it forward". The interviewee is an alumnus of Otago Polytechnic's Bachelor of Applied Management degree (School of Business). She also commented on the advantages for students getting the "practical and essential corporate training experience" as they enter their third-year of HR study.

BRINGING IT ALL TOGETHER

Students overwhelming supported this hands-on experience. Here are some of their final comments:

Overall, we felt that the staff made us feel very valued and of an equal status rather than making it feel hierarchical. As attendees of this induction training, we felt honoured to be invited and to have been able to participate in this programme. It changed the way we thought of the DHB, as we did not realise how close the team members were with each other. This induction gave us an insight and more in-depth look into the background and behind scenes of what work goes on at the Wakari Hospital such as; security procedures, kaupapa Maori, emergency management.

As a staff member, I would have been very excited moving into a position here. The induction programme would have made me feel knowledgeable and respected. Hearing the values of the Hospital such as Manaakitanga (kind), Pono (open), Whai Whakaaro (positive) and Whanaungatanga (community) showed how they value everyone and support each other. It would have made me feel very safe moving into such a progressive and caring workplace.

From the DHB's perspective, the collaboration was also successful, and provided an excellent platform for generating new insights and ideas for strengthening the current induction training programme. Implementing strategies that increase hands-on experiential learning in the field of HR prepares students for the complex real world of HR practice.

In conclusion, this paper presents an overview of an innovative way of collaborating with industry for developing and applying new knowledge and skills for all stakeholders, and demonstrates how changes to more traditional forms of education can achieve significant positive outcomes with minimal systems change.

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WHAT STRATEGIES CAN BE IMPLEMENTED TO BEST MEET THE NEEDS OF AN AGEING WORKFORCE?

Taryn Benfield

INTRODUCTION

The Organisation at which this research project has been undertaken is based in Dunedin, and employs 523 staff across the South Island. The catalyst of this research is the rate and the effect that the Organisation is currently experiencing related to the shift of age-demographic, shown by the average age of employees (46 years), and percentage of employees over 55 years (30%).

The aims for this research project were to identify what strategies the Organisation has in place or is already planning to manage their ageing workforce; what strategies align with the needs of the employees, the Organisation's vision, mission, and values, as well as current best practice; and what factors need to be considered in order to implement an Age Strategy or Diversity Policy promoting older workers. These aims have then been used to answer the research question: "What strategies can be implemented to best meet the needs of the ageing workforce at the Organisation?"

This research has been conducted to provide recommendations to the Organisation for the purpose of understanding and addressing the implications of the demographic shift on the Organisation and to improve the productivity and performance of the Organisation's ageing workforce.

The research into strategies as to how the Organisation can better manage the ageing workforce will potentially benefit the Organisation positively by producing practical outcomes designed for the company. The research will provide specific areas of focus for management with clear evidence as to which strategies would receive the most stakeholder support; with the aim of higher worker engagement, overall wellness, and retention of institutional knowledge.

RESEARCH METHODOLOGY

The researcher has used methodological triangulation involving the use of multiple methods to gather data (Kennedy, 2009). Triangulation has been achieved by engaging with employees through the use of electronic surveys, interviewing individuals in positions of leadership and management, and reviewing and analysing historical information.

A survey was selected for this research project to collect information from participants the aged of 55 years and over who are current employees (171 employees). This, in turn, aided in providing recommendations to the Organisation as to how older workers feel they are supported and could be better supported by the Organisation to do their best work, about any age-related discrimination they may feel in the workplace, and their job satisfaction.

The survey was also used to identify what areas of best practice that employees valued most. The survey contained 12 questions using the Qualtrics Survey platform and included Likert scale questions and multi-choice style questions. There were also several open questions in the survey to allow for the more enthusiastic and opinionated of participants to express their feelings where appropriate; none of the open questions included forced responses. These were grouped into categories: (1) employee benefits and job design, (2) training and upskilling, (3) health and wellbeing, and (4) social wellbeing.

One-on-one interviews took place at the Organisation for the specific purpose of exploring the research question. This information was used to provide the researcher with perspectives on: the Organisation's ageing workforce, current plans, quality of communication, succession planning, mentoring, and management support. Interviewees included four members of the Organisation's staff from various business units with different responsibilities to the business and to employees.

Historical data was used to provide information to analyse demographics, total workforce numbers and the progression of the workforce age profile at the Organisation. This method of data collection was considered appropriate as business metrics are recorded and reported on a monthly basis. This data supplied information such as diversity and demographics, age, generation, tenure, gender, headcount, and net workforce change.

PERCEPTION AND BIAS

The concerns of employers for the ageing workforce included unscheduled leave of absence (health or family-related), the inability or unwillingness to attain new skills (particularly in technology), and in retaining these employees when they were heading towards retirement (CIPD, 2015). However, excluding the movement towards retirement, these points could be made of any demographic and could show discrimination against older workers for what could be unjustified bias towards the older worker. Buyens (2009) describes that when this unjustified bias towards older workers is prevalent within a workplace, that ineffective management practices can often create a self-fulfilling prophecy; for example, if an employer...

> believes older workers cannot learn new technology, or are not willing to learn new technology, then they are not likely to offer older workers the opportunity or experience and therefore the older workforce will become less technologically able over time (Volti, 2012, p.83).

Age-discriminatory behaviour is shown to be embedded in New Zealand's culture. When interviewees were asked to describe the main issues facing older workers at the Organisation, three of the four respondents replied with comments regarding the reduction of the health and physical ability of older workers due to the manual labour requirement of many of the positions at the Organisation. As stated by Bamford (2016), older workers are not more prone to injury than younger workers, but the costs to employers may be more significant as recovery periods increase with age. The likelihood of suffering from long-term (chronic) health conditions also increase as individuals age (Bamford, 2016), which will also incur costs to the business through lost productivity. Therefore, one of the main challenges is changing the perception of those in management and leadership positions to acknowledge that the workforce is ageing and that supporting them to stay in the workforce longer will benefit the business (Kaur & Verma).

When considering retention for other demographics, it is not retirement that is of concern, but rather the pull of other employment and opportunity (Brook, 2003). The challenge when educating employers, employees, and public about unjustified bias is that rather than have the required result, it will often confirm the stereotype (Buyens, 2009), This effect is known as 'stereotype threat' (von Hippel, Kalokerinos & Henry, 2013) and is characterised by the unintentional change in performance by individuals as they meet the expectations of the stereotype of their group.

There is a strong perception from employees that age-discriminatory behaviour is not an issue in their day-to-day work, and that the Organisation is engaging in age-neutral management practises and decisions. These factors are likely to contribute as to how happy the Organisation's employees expressed they were in their work and how valued they felt at the Organisation, with 65 percent of survey participants indicating they felt valued in their work and 85 percent indicating they felt happy in their work. Research by Hermansen and Midtsundstad (2015) has shown that the care, value, and appreciation shown to an older worker was also proven to be a major factor in the decision to remain in the workforce.

It has already been established that older people of the Baby Boomer era are healthier than their predecessors, and that the onus falls on the employer to manage the needs of this employee group. The correlation made in research conducted by Hermansen and Midtsundstad (2015), showed that an employee's tenure and their enthusiasm for the job were the same across all generations. The care, value, and appreciation shown to an older worker was also proven to be a major factor in the decision to remain in the workforce (Hermansen & Midtsundstad, 2015), and therefore any age bias shown as age-discriminatory behaviour towards the older worker could be a contributory cause in the decision to retire. However, issues were brought forward by the employees which were drawn out from four open-ended questions on the survey. The four questions were worded so as to provoke a response about what support might be required and issues employees are facing both currently and in the foreseeable future. Many respondents did not directly state the physical nature of the work, although several made comments regarding "Extra eye and hearing checks", "Follow-up from company nurse", with one explicitly stating: "Redundancy or retirement as most of us never make the average age".

Age discrimination is unlawful in New Zealand under the Employment Relations Act 2000 and the Human Rights Act 1993, unless the job is directly affected by an age limit. However, research has suggested that there is a 'silent tipping point' of between 50–60 years of age where an organisation may see employees as less attractive (McLeod & Bentley, 2015), even though maturity and age has been shown to be a positive factor in many aspects of work. The survey respondents identified that discriminatory behaviour was not an issue in their day-to-day work from managers regarding job assignments (84%) and daily leadership (84%). Also, that negative stereotypes regarding older workers was not a problem for the majority of respondents (84%). A significant trend shown amongst employee responses from the open questions was the desire for "career development within the business" and various forms of training, including basic IT training, and the management of staff. However, 31 percent of survey respondents identified age-discriminatory behaviour regarding opportunities for personal and professional development at the Organisation, as well as 28 percent of respondents who identified age-discriminatory behaviour regarding individual promotion. So, it can be implied that as employees age, management tends to side-line older employees and their potential, thereby creating a stagnation in career development of older workers.

Empirical studies undertaken by Mountford (2011) have described the increased performance of emotional labour and improved social reasoning by older workers, as well as providing evidence as to how innovative capacity does not decrease with age; they were: "self-motivated, disciplined and respectful of authority, had superior communication skills and credibility with customers, were dependable and loyal, created a positive image for the organisation, had an equal ability to learn new skills, and performed work of higher quality" (Mountford, 2011, p. 170).

It is also important to note that of the interviewees, only one was a direct manager of a team managing older workers, and as stated by Kaur and Verma (2011) "Employers who have less personal contact with older workers have more negative attitudes toward them than employers who have more personal contact with older workers".

GENERATIONAL VALUES AND CHALLENGES

For the 25 – 40-year-old age group there is a significant emphasis on feeling appreciated and being heard without being micromanaged; including trust, recognition, and the freedom to make decisions (CIPD, 2015). For the 40 – 65-year-old age group, value is placed on more practical aspects such as work-life balance and flexible arrangements (i.e. being able to work around children and ageing parents) (CIPD, 2015). The challenge lies in establishing open and appropriate channels of communication between employers and employees to establish the needs and wants of the workforce, build trust, relationships, and provide crucial personal feedback (Znidaric, Penger, & Dimovski, 2011). The key benefits of an age diverse organisation are the ability to share knowledge through the mix of skills, experience, expertise, and perspectives. An older worker may have experienced a process that a younger worker may only have theoretical knowledge of, whereas a younger worker may have recent training in new practice and methods that can be shared (CIPD, 2015). A skills and knowledge gap has begun to affect the industry in which the Organisation operates, and is likely to be replicated in other departments under the current retirement strategy at the Organisation.

There are different traits attributed to each generation which can be seen in the workplace, particularly the change of socially acceptable interaction. Of particular importance is the availability of new technology that alter the channels of communication. Non-verbal messages that are included over and above spoken and written communication are important when engaging with individuals from different generations, ensuring that there is an understanding of the message between sender and receiver.

The Baby Boomer generation consists of those born between 1946 and 1964 which currently includes all of those aged from 55 to 72 years, Generation X are currently 38 to 53 years, Millennials range from 23 to 37 years, and Generation Z currently being those under 22 years (although these are approximate and can overlap as there is no standard definition). The benefits of creating a generationally diverse workforce extend beyond passing on institutional knowledge and skills related directly to the role. 'Soft skills' can also be advanced through observation and interaction with others to develop the traits that are typically needed in the workplace, and that mirror the values of older generations. Individuals belonging to the Baby Boomer generation are generally loyal to one organisation (demonstrated by length of tenure). They are results driven and give maximum effort, are respectful and accepting of authority figures, as well as having the ability to retain the information and skills that are learned (Kaur & Verma, 2011).

To break the formality of such traditional employee/employer roles and help build trust and relationships in the workplace, it has been shown that employers and others in senior positions can create a positive impact by showing a genuine interest in their employees and by communicating with them directly (Znidaric, et al., 2011). Methods such as sitting down to lunch or an afternoon tea break together are an opportunity for informal discussion, and sending reports, letters, and memos directly to employees instead of through administrators or heads of department appear to be more personalised (Znidaric, et al., 2011). It is important that mutual trust is established through open lines of communication to establish what older workers want and need from the employer and the Organisation so that these employees can be retained, and company-specific knowledge can be captured.

To evaluate how to best utilise the skills of the older worker, employers re-engage with this generation so as to ascertain the employees' future goals and values, and how to maximise the Organisation's investment in human capital. The Organisation currently collects this data via the 'About Me' employee development and review process, which provides an opportune time to provide a tailored plan and support options. Engagement can be improved through a culture of strong communication both between managers and employees and within teams. Interviewees were asked what organisational supports were available to older workers, with the responses revealing inconsistent results. Almost half (48%) of survey participants indicated they had either no support or were unaware of support provided by the Organisation, while a further 36 percent stated that the Employee Assistance Programme was their only support. These views were corroborated by interviewees who all agreed improvements could be made in communicating information about what support are available to employees.

Although those aged 55 years of age and over are defined as 'older workers' for the purpose of this research, specific ages were not as important when planning for the older workforce as an individual's experience, different levels of health and physical ability, aspirations and goals, and financial circumstance (Pearman, 2016). Therefore, any planning for the older workforce would be better viewed as 'stage-related' instead of 'age-related'. Although career paths and training have already been noted as highly important to some older workers, other participants have raised the need to reduce their days of work and to receive increased support to plan for their retirement. One survey respondent indicated an awareness that, "I would like to work with the Organisation for another three years and be supported in this endeavour". This kind of information is invaluable and gives the Organisation sufficient time for recruitment, as well as supporting the current employee in transitioning out of work by reducing hours, training a successor, or mentoring, "To give them the flexibility in their transition now so it's not just simply one day they're at work, the next day they're not".

BEST PRACTICE

There are three main areas of focus of human resource best practice for the ageing workforce identified including: integrated wellness programmes; job design and ergonomics; and employee benefits for older workers (Bamford, 2016), for the purpose of addressing the ageing workforce and limiting the risk of the loss of this human capital. Training and upskilling for older workers as well as engaging in mentoring enhances participation and demonstrates commitment to renewing this human capital (Ministry of Social Development & Office for Senior Citizens, 2011). The options for older workers at the Organisation are limited regarding what supports are currently available and are dependent on the employee initiating any communication with their manager or human resource staff when their needs change. Inconsistencies have appeared between survey respondents who would like supports such as: more training, four-day work weeks, discounts, medical insurance subsidies, although some of these requests are already available to them. Possible miscommunication between employees and managers, and between employees and Human Resources (HR), or because a significant amount of time passed since their initial induction period, has resulted in the employees no longer being aware of their entitlements, therefore indicating the requirement for improved methods of communication.

It is important for organisations to consider programmes and strategies that are inclusive of all age groups so as to limit an 'us and them' mentality and to instead focus on sets of skills and experience (Bamford, 2016). In research conducted by the Auckland University of Technology, organisations were surveyed as to whether they had an effective age strategy: 23% of organisations currently had one in place, 33% of organisations were planning to introduce one in the next two years, and 44% of organisations were unlikely to have one in the next two years (McLeod & Bentley, 2015). These findings were in contrast to the CIPD (2015) report 'Managing an age-diverse workforce: What employers need to know' which showed 70% of UK organisations had some supports in place. Of these strategies, the top five that had been put in place were: (1) using older workers to mentor, train or coach inexperienced or young workers; (2) flexible work arrangements for older workers; (3) graduated retirement for older workers; (4) health and wellness programmes for older workers; and (5) training for older workers (McLeod & Bentley, 2015).

As was shown in the survey results, employees identified the desire to reduce their days and/or hours of work, as well as assistance for retirement planning by way of seminars. Interviewees suggested providing contacts for the employee to begin planning for retirement so they have some kind of support in place for their transition out of work. The results indicated by survey participants are generally consistent with findings from research by McLeod and Bentley (2015).

It has been found that employers who were more likely to see the importance of issues affecting the older worker were those who saw the value of increasing esteem, and repositioning, and also by those who preferred early retirement themselves (Mykletun, Furunes and Solem., 2012). Strategies and tools to retain older workers such as wage increases, bonuses, and reduction of workload or hours were also more likely to be used by older managers and female managers (Mykletun, et al., 2012).

There is a strong desire from employees (66%) for the Organisation to provide medical insurance or a sufficient subsidy to make this a realistic option for employees (currently the Organisation provides a 5% subsidy through Southern Cross Healthcare). Many employees (47%) also expressed the desire to utilise the option of a six to eight week sabbatical to pursue other interests. The option of a sabbatical may be preferential for an employer who wishes to retain a valuable employee who would otherwise choose to retire. To utilise the extensive knowledge of the Baby Boomer workforce in all areas of the business, mentoring relationships should be initiated. Buddying/shadowing for new employees would also reduce some of the physical aspect the job requirements for older workers, while passing on institutional knowledge and creating an age-diverse culture.

CONCLUSION

There is a necessity in the current climate of age demographic shift for the Organisation to be proactive in their approach to strategies that address the ageing workforce, rather than a reactive strategy when individual employees approach their superiors for assistance, or when the Organisation perceives a critical need. Five major recommendations have resulted from the conclusion of this report: 1) Implement a mentoring programme, 2) Improve access to training opportunities, 3) Increased medical subsidy, 4) Flexible work arrangements, and 5) Improvements in the collection, use and storage of data. Currently the Organisation is in the planning stages of a mentoring programme. The Organisation also offers ongoing training and various workplace benefits (N3 card, 5% Southern Cross subsidy). However, specific support for older workers is only negotiated with the individual when the employee is experiencing difficulty, or their needs change.

The strategies listed by McLeod and Bentley (2015) and Bamford (2016) were indicated by all interviewees as areas that could be improved on by the Organisation with focus on: knowledge transfer, flexible working arrangements, wellbeing, and ongoing training. These strategies align with the current and future needs and goals of the employees as indicated by survey results.

To implement an Age Strategy or Diversity Policy Promoting Older Workers, the Organisation must ensure there is the human resource capability to do so, and that it is appropriate to the standard and fit-for-purpose, which would incur additional costs. Buy-in from all relevant stakeholders is also required: managers, leadership group, and colleagues, to mitigate the risk of creating an 'us and them' mentality. There is also a risk of stereotyping the older worker as a group who are in need of extra support, whereas this is not the case; rather they are in need of more appropriate options. In summary, the issue of 'value' of the older worker is not just in terms of production (efficiency) but needs to incorporate value in other aspects of their contribution to the workplace.

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KEEPING IT REAL IN CHANGING TIMES: PRAGMATIC STRATEGIES TO SUSTAIN EMPATHY

Marjolein Schaddelee, Samuel Turner and Dr Lesley Gill

INTRODUCTION

Empathy is still a frequently disputed component when it comes to leadership and in particular in relation to being able to take decisive action in times of change (Marques, 2015). After a mass shooting in two mosques in Christchurch in 2019, New Zealand's Prime Minister Jacinda Adern received international praise for her empathic leadership combined with the ability to take concrete actions related to gun control (Salam, 2019). Our research interest was initially sparked by findings in earlier research related to emotional intelligence (EI), which pointed to the value of the role of empathy for workers at all levels, and therefore the value of empathy training and development in the workplace. To follow up, interviews were undertaken in early 2017 with a mix of empathy trainers and managers of organisations where empathy is signalled as a key skill. The purpose of the inquiry was to mine their perspectives of empathy training and discover emerging themes of empathy in the workplace, identify relevant components that contribute to developing empathy skills and develop models that elucidate optimal ways for developing one's empathy. The need for developing these skills ignited further interest in finding out more about how empathy is developed based on the assumption that empathy can be learned (Gill, Schaddelee, Ramsey, Turner & Naylor, 2018; Gill, 2015).

This research sought people's viewpoint of what empathy is and why it is important personally, and in the workplace. Our findings uncovered some of the challenges that trainers and managers experience in relation to empathy and/ or empathy training in the workplace. We begin by presenting early findings on which this research was premised upon by way of background. We then present two of the emerging themes related to empathy burnout, and recommendations for recovery and empathy sustainability.

LITERATURE REVIEW

Empathy

Empathy has been described as sensitivity to the emotional experiences of oneself and others around them (Whiteside & Barclay, 2016). Empathy is a social and psychological construct involving cognitive and affective factors that interact dynamically to produce compassion. According to Cherniss and Goleman (2001) empathy is an integral element of EI and is considered one of the two foundations of social effectiveness - the other being self-management - both of which are essential for successful relationship management. Empathy is a fundamental component in building connections with the people in our lives, whether it be work-related or interpersonal relationships. Allison, Barron-Cohen, Wheelwright, Stone and Muncer (2011) describe empathy as a tool that enables a person to be a powerful and intuitive communicator that develops an understanding of the immediate environment, and make predictions based on observing the behaviours of others and responding appropriately.

Unsurprisingly, people working in caring professions demonstrate higher levels of empathy in comparison to other work groups. The value of empathy can be observed in the nursing sector, where Kleiner and Wallace (2017) found a positive relationship between the degree of empathy and compassion exhibited by a nurse, and a patient's response to treatment and recovery time. This relationship, however, is not exclusive to the nursing sector, and is found in many other service-based sectors where caring or helping is a key focus (Mehrabin & Epstein, 1972).

Empathy is an essential component that predisposes certain people to develop a genuine desire to help others (Martin, Rogers, Anthony & Rowling, 2017). Empathy is a required attribute in the police force and applicants must demonstrate a significant predisposition to qualify (Charman, 2015). In addition, Charman (2015) argues that empathy does not only improve the effectiveness of a police officer, it develops a stronger appreciation of the role and a clearer perspective of unfolding events. Such perspective may enable a police officer to better care for colleagues that struggle with the complexities of the role (Martin, et al., 2017). It is not surprising that empathy is at the forefront of modern education and recruitment for police officers. As Martin, et al. (2017) states one of the main challenges facing today's police officers aside from the obvious risks, is the emotional and mental exhaustion experienced by fellow officers. Charman (2015) and Martin, et al. (2017) suggest developing empathy early on in an officer's career will equip them with knowledge and understanding of emotional fatigue that they may experience.

Compassion fatigue

Compassion fatigue or empathy burnout is described as "a syndrome of emotional exhaustion and cynicism that occurs frequently among individuals who do 'people-work' of some kind (Maslach & Jackson, 1981, p. 99). The effort of trying to deal empathically with people all the time can lead to feeling worn out and potentially to a burnout (Johnson, 2013). Hojat (2009) notes that compassion fatigue is a real risk in professions where high levels of empathy and EI are needed. Hofmeyer et al. (2016) describe compassion fatigue for nurses as "losing their nurturing ability toward patients, toward colleagues, and toward themselves" (p. 203). Symptoms of compassion fatigue include depression, anxiety, despondency, depersonalising patients, lethargy, lapses in concentration, low self-esteem, irritability, apathy and physical fatigue (Schwerman & Stellmacher, 2012; Slatten, Carson & Carson, 2011; Thompson, 2013). Compassion fatigue results from dissatisfaction and powerlessness to do anything about the stressors in the work environment which can be compounded by the pace of change in organisations (Radey & Figley, 2007).

Kleiner and Wallace (2017) noted that caring professions are likely to have workers that are already emotionally and mentally burned out. As such, the medical field has been subject to much research on emotional burnout as any worker required to show empathy for extended periods of time may experience symptoms of compassion fatigue (Johnson, 2013). Hojat (2009) argues that high levels of empathy are difficult to maintain, and those working in caring professions are likely to experience a sharp decline in empathy which correlates to their length of service. Time pressure, significant caseloads, unfavourable working environments, and professional and personal relationships may be causes of decline in empathy (Slatten, Carson, Baker & Carson, 2013). Interestingly, Varca (2009) found that employees who displayed high levels of empathy were more likely to suffer from stress and burnout.

Compassion satisfaction

In contrast, compassion satisfaction, is described by Baldschun (2014) as the degree to which a care professional feels fulfilled through their compassionate work with clients and colleagues. Slatten et al. (2013) explored the needs of health and human services sector professionals, finding that staff who were proactive, experienced compassion satisfaction, and were less likely to experience compassion fatigue. Proactivity relates to staff who are self-motivated, seek out opportunities to help the organisation, challenge the status quo, voice their concerns about a problem that needs to be solved or prevented, and sell their ideas enthusiastically, set action-oriented objectives and demonstrate resilience (Slatten et al., 2013).

Tierney, Seers, Reeve and Tutton (2017) noted that compassion satisfaction is moderated by the quality of relationship between the carer and their client. For example, the client shows gratitude towards their carer for

providing compassionate assistance, thereby creating 'job satisfaction', which further encourages the carer to continue providing compassionate care, as they are 'recharged' by positive emotions. Prysmakova (2016) found that a reliance on positive feedback from a client created a level of co-dependency that may not always be fulfilled, thereby increasing the likelihood of experiencing emotional exhaustion and compassion fatigue. Tierney et al. (2017) stated, "Without a degree of reciprocity; without the carer's needs being recognised, and without finding meaning in the interaction, one-way compassion is likely to lead to burnout" (p. 10). Managers must therefore take proactive measures to inform and protect their workers to reduce the risk of compassion fatigue (Somogyi, Buchko & Buchko, 2013). A proactive measure such as a top-down commitment to fostering an encouraging and supportive environment where the delivery of compassionate care is of paramount importance, mitigates the effects of empathy 'drain' (Tierney et al., 2017). Additionally, support measures or benefits such as employee assistance programmes, are essential for providing the tools and resources to manage work-related stress (Kleiner & Wallace, 2017).

Organisational structures and empathy

In contrast, Prysmakova (2016) noted that centralisation at an organisational level further complicated worker experiences, as control and decision-making power is reduced, and workers may feel micro-managed by an overarching policy or procedure. The impact of centralisation on workers is that they do not have discretion to deal with individual situations, but are forced to use a blanket approach that is oftentimes inadequate to meet the clients' needs.

Workers are likely to experience compassion fatigue if they believe the organisation does not care about them as an individual (Tierney et al., 2017). For workers to address their own needs, Slatten et al. (2013) described the use of supportive group interactions to increase compassion satisfaction and self-awareness of their emotions and cognitive function. Proactive workers thrive in cohesive groups as they are interpersonally fulfilled through their compassionate work with patients and colleagues. Furthermore, interactions in supportive groups allow workers to show concern, empathy and interest in their colleagues' welfare, thereby positively affecting their compassion satisfaction and quality of care. "Proactive employees assert themselves and competently change parts of their work environments that are stressful and dissatisfying" (Slatten et al., p. 164). Due to the nature of healthcare environments, compassion satisfaction is at ongoing risk of diminution as maintaining high levels of empathy can be unsustainable (Tierney et al., 2017). Somogyi et al. (2013) and Prysmakova (2016) identified that it is imperative for managers to showcase compassion and empathy toward their workers, and encourage proactive measures to maintain compassion satisfaction and reduce the risk of compassion fatigue.

RESEARCH METHOD

Semi-structured interviews were conducted with a pilot group of five empathy trainers and five managers of organisations where empathy was signalled as a key skill. These spanned: nursing, police, aged care, midwifery, disability sector, museum and church-based organisations. The purpose of the inquiry was to mine participants' perspectives of empathy in the workplace so as to increase our understanding of empathy, highlight empathy issues, and identify components that contribute to developing and/or regenerating worker empathy.

Semi-structured interviews provide flexibility to explore participants' perspectives (Dey, 1996). The interviews took 30-45 minutes each, were audio recorded and transcribed. Findings were then analysed and organised into themes. Corbin and Strauss (2008) emphasise the interactive nature of this analysis process. As this research was carried out as a pilot study and the sample size was small, this can be seen as a limitation of this research. Nevertheless, the findings highlighted useful themes and strategies for reducing compassion fatigue and sustaining empathy.

DISCUSSION: THEORETICAL AND PRACTITIONER IMPLICATIONS

Compassion fatigue in caring profession workplaces was embedded, which has implications for health and safety in organisations, and the responsibility this places on managers to ensure the health of their workers. The discussion follows two threads: compassion fatigue and; identifying strategies to combat empathy burnout.

Compassion fatigue

One of the issues contributing to compassion fatigue is establishing boundaries between work and 'rest from work' (some might call it work/life balance); or perhaps better defined as work-engaged, and work-unengaged. Employees who are 24-hour contactable never have an opportunity to be fully unengaged, which means psychological and emotional demands are being made on them all of the time; waiting for the phone to ring is work, and then dealing with the issues that people raise when they phone, as these comments describe:

> I've always given people my cell phone number so they can contact me, so I'd spend a lot of time at home, and in the weekends talking to the people I am dealing with, and I think that I did that for such a long time. It's very consuming…I think it takes a toll on the individuals and me. I got to a point where I felt like I'd hit a wall, and I couldn't – I felt that I lacked empathy at home, I could give it at work, but I couldn't give it at home.

> You're giving, giving, giving so much in your role, that you get tapped out, and it takes its toll on you.

> I'm quite clear on my boundaries.

Another participant explained that setting boundaries is not always that easy in a support or care environment:

> We have all of this in policies, such as professional boundaries. So we try to say, "This person is your staff, not your friend". The problem with that, is a lot of the people we support don't have any friends. They don't have friends outside of the staffing, maybe not even their family. So for them, we may be the only people coming in, and we're saying, "We're not your friends". So it seems kind of weird, but it's one of the [issues] of professional boundaries.

Similarly, workers in caring industries commented that their colleagues/clients/customers were embedded *in* their work, that is, they were the focus of their work, and comprised a very important part of the work they do. Research carried out by Hojat et al. (2009) showed that although empathy levels remained constant through the first two years of their subjects' medical training, by the third year their empathy levels had declined significantly. The reasons for this decline were varied and complex, and included time pressure, a lack of role models, a high volume of materials to learn, and patient and environmental factors. Patients' or clients' situations and needs can be demanding, and therefore, can be quite draining on the carer's reserves. Thus, care workers needed to have strategies for safeguarding themselves from getting too involved emotionally, and giving too much.

> When you do become emotionally involved, you build defences to protect yourself. And that stops empathy from running its proper course.

This participant points out that they need to somewhat withdraw giving empathy for self-preservation. Participants voiced that having a name for it – compassion fatigue – assigned it value and called it for what it was, thereby helping them see that they were not weak, failing or performing poorly.

> It was good to be able to call it something, and that I wasn't just being a grumpy mum.

Having an appreciation that the expenditure of empathy in their work had consequences in other parts of their life, was a revelation for some:

> *It [brought] a realisation that I needed to have a break from that [work] environment.*

Care workers identified the psychological strategy of differentiating between work engaged and work-unengaged, such as creating express delineation between work and home life.

> *I have to protect myself emotionally too. The biggest thing I do to protect me, is not wearing my uniform at home. It's like a switch. I can relax and detach, and that's how I protect myself.*

Another tactic that participants used was to deliberately disengage from the negative affect of the situation by mindfully contemplating potential good that might emerge from the difficult or demanding situation:

> *In terrible things, we see benefits. It does come with working in our world a little bit, and sometimes it helps keep people sane. It's a coping mechanism in a way.*

Krasner et al. (2009) note that "physician burnout has been linked to poorer quality of care, including patient dissatisfaction, increased medical errors, and lawsuits and decreased ability to express empathy" (p. 1284), while West et al. (2006) reported that "increased burnout in all domains and reduced empathy were associated with depersonalisation, emotional exhaustion, and lower personal accomplishment" (p.1071). These are all good reasons for the development of strategies for workers to sustain empathy levels and avoid experiencing burnout.

Identifying practical strategies

Participants used several actionable strategies for maintaining their empathy, which we have collated. Based on these findings, three strategies emerged, which are:

1. Increasing colleague support

2. Creating opportunities to share experiences (formal and informal)

3. Increasing quality of communication at all levels of the organisation

Each of these strategies is discussed in turn.

1. Increasing colleague support

Increasing opportunities to collaborate conceptualises the adage, 'a burden shared - a burden halved', as these comments convey:

> *People are encouraged to collaborate, we've got open planned offices, encouraging people to talk about cases.*

> *We try to provide a healthy work-life balance thing, we have team building days, we have stuff like that. We try to promote some sort of social interaction amongst the staff.*

Schwerman and Stellmacher (2012) suggested improving the support of colleagues and increasing the quality of communication at all levels of an organisation enables workers to share their experiences with others in similar work environments. Thompson (2013) found that providing workers with an opportunity to share their stories with

others – particularly those in caring professions, reminds them of why they entered the profession, and gives them a renewed sense of value, compassion and empathy to carry on in their work.

2. Creating opportunities to share experiences (formal and informal)

Creating a work environment that expressly gives opportunity for workers to download the human tragedy of their clients, customers and co-workers, values the workers' contribution and the stories of customers, clients and staff. Sharing experiences is very helpful and supportive for care workers who continually offer empathy in their work situations, as it provides opportunity to unload the emotional baggage they have carried for the people who needed it, to gain 'perspective', and to support each other as these comments explains:

> *We tend to talk a lot to each other. A lot of the really horrible stuff we deal with, does get dealt with by black humour.*

> *We promote the discussion of cases. And we promote transparency of work. So if someone has their work looked over, and say "Hey what are you doing" we encourage it. And that helps maintain that kind of sense of normality of understanding, of what is right of other people, by having others look at your practices.*

Tierney et al. (2017) noted that reciprocity was needed to counter empathy burnout in that carers need to be consistently 'filling their tank' to create a reservoir from which they give out of. For workers to address their own needs, Slatten et al. (2013) described the use of supportive group interactions where workers could share their work stories within their specific service/caring workload (as opposed to on top of). Cohesive groups provide a platform to talk freely; and have high trust, which is an excellent environment in which to have vulnerable conversations. Gill, Ramsey and Leberman (2015) identified that trust is a "vital aspect of a safe environment where [people] could talk freely and disclose information that was linked to feelings of vulnerability" (p.268). Furthermore, interactions in supportive groups allow workers to show concern, empathy and interest in their colleagues' welfare while experiencing support personally.

3. Increasing quality of communication at all levels of the organisation

Many of the participants commented that their organisation was committed to encouraging staff to undertake supervision, to talk about the situations they are expending empathy.

> *I guess supervision has always been a good thing, and I have asked for additional supervision in the past.*

> *…. every staff member here has supervision.*

Finding a trusted person outside of the workplace was also identified as a useful strategy for preventing empathy fatigue:

> *I talk to my husband a lot. He's really good to talk to. Even just talking, because nothing else really changes it.*

Participants noted the value of both formal and informal communication in the workplace, for example:

Training and meetings, but I'd also talk to [my staff] one to one as a team leader.

Just talk to them about it.

I certainly think having a more diverse workplace [different caring departments] has probably made us more empathetic.

However, different organisational structures and staffing might pose some challenges to communication. One participant commented on this:

And you might not even see the other staff very often. Like you'd be working on shifts, one to one, so you wouldn't even see a hand over where you'd leave notes around for other staff.

Additionally, workers need to take time to rest; physically, emotionally and mentally, to sustain their levels of empathy for others. Eikeland, Ornes, Finset and Pedersen (2014) conducted research with third-year medical students, noting that several studies have shown a decline in empathy amongst medical students in their third year. One of the reasons given by the students for their declining empathy was that the importance of biomedical learning took precedence over their ability to manage the emotional aspects of their relationship with their patients. Although students received tuition in communication, behavioural science, and empathy, time constraints meant that the focus was on taking the patient's medical condition. This seems unfortunate as according to Simpson et al. (1991) "effective communication between doctor and patient is a central clinical function that cannot be delegated" (p.1385) and the quality of clinical communication is beneficial to patient outcomes. The authors also believe that the teaching of active listening and empathy skills is proven to be of unquestionable benefit to the doctor patient relationship. Organisations might also consider how they timetable or rotate workers on the frontline, so that offering empathy on a long-term basis is realistic and achievable.

CONCLUSION

Compassion fatigue, which describes the expenditure on a care worker's empathy to the point where it creates a real risk to health of the care professionals, is costing organisations, both financially and the human cost of empathically burnt-out workers. The ever-increasing pace of change in organisations provokes responsible leaders and managers to explore proactive ways to educate and improve the health and welfare of their workers, and reduce the risk of compassion fatigue before it occurs, as well as tackle its after-effects in current workers. Developing self-awareness of compassion fatigue enables the worker and their colleagues, to identify signs and symptoms in themselves and others, and so to seek help before these symptoms escalate to the point of 'break-down'. Creating supportive networks and opportunity to rest allows workers in caring industries to recharge, and re-generate their empathy reserves. Increasing the quality of communications in and across all levels of the organisation, provides impetus and opportunity to give and receive understanding, support and empathy in industries that endure continuous change and work on the coalface of society's human challenges. Empathy training in the workplace would also hold much benefit by alerting care workers to the warning signs of empathy depletion and offer new insights and understanding for balancing empathy reserves and empathic expenditure.

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CULTURE CHANGE: ENGAGING HEARTS AND MINDS

Jan Samuels

INTRODUCTION

Why are we as humans so fascinated by change? Is it because it either unites or divides us in equal measures? Or is it because the prospect of change often ignites a strong range of emotions from terror to elation and everything in between?

For many, changes particularly within society or organisations, mean individuals feel they have limited input or control. Change is one of those essential elements that we need to understand and master if we are to survive. Change is a constant flowing life force that affects everyone, every minute of every day. We can embrace it and thrive; it is all a matter of choice.

Block (1968) later included in a published study in 1980 the concept of ego-resiliency after documenting the lives of 100 young adults over more than 30 years. Participants of the study demonstrated personal traits based on three sets of beliefs that:

1.   We can find a meaningful purpose in life

2.   We can influence one's surroundings and the outcome of events, and

3.   Positive and negative experiences will lead to learning and growth.

Young adults that held the three key sets of beliefs were better able to adapt flexibly to different circumstances and succeed in the midst of challenge and change.

Every day, we are subject to hundreds of subtle changes to climate, language, physiological, psychological, diet, fashion trends, lifestyle, opportunities, technology, attitudes, judicial, organisational and educational. Over the years, the speed of change has increased. This is due to increased knowledge and our pace of development globally has accelerated immensely, to the point where it threatens to overwhelm political leaders, according to Brown (1996).

Burke (1997) wrote an "Alternative view of Change", which explored how history progresses due to the synergistic interactions of past events and innovations. Burke also posed the question about what happens when the rate of change and innovation is too much for the average person to handle and what it means for individual power, liberty and privacy. Accelerated change is perceived to be at an increase in rate because of technological advances, which suggests faster and more profound change in the future, which may or may not be accompanied by equally profound social and cultural change.

Depending on our personality and belief systems, some of us thrive on change, flow with it and take advantage of new situations. Some of us try to reduce, and resist the impact of change, and some do both on a regular basis; it is all part of the four emotional states described by the Kubler-Ross in the Grief Model (1969).

Organisational change costs a significant amount of time and money and can often have a very negative and polarising effect on individuals and teams. Organisational change is often challenging and does not always achieve its results, because organisations lack knowledge of how to fully engage individuals and teams. Change should deliver positive outcomes for both the organisation and individuals, rather than one being at the cost of the other.

WHAT IS CHANGE ALL ABOUT?

If we as individuals and organisations are forced to change to survive and create the best opportunity for change, then we really need to understand, what change is and how it comes about. Change in whatever form is like evolution, it is a series of minor and varying events that over time lead to a permanent state of being. A famous quote by Darwin (1908) is,: *"It is not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change"* as cited North & Varvakis, 2016, p. v.

So much has been written about change, but it still baffles and overwhelms many of us. One of the most interesting books on change is the parable written by Dr Spencer Johnson called *Who Moved My Cheese?* (1998). His book is a wonderful analogy written about change; why it occurs, and why we need to view change as an essential part of life for survival. It also highlights the importance of organisations and individuals being able to anticipate when change is needed. The ability to anticipate change is the key to experiencing a level of control over change. This anticipation also gives the strongest opportunity for adaption, necessary for ongoing success and development.

Where the hearts and minds of people are engaged and invested in change, incredible and long-term change can be achieved. A good example of this commitment occurred in Iceland between 2009 and 2011. The financial crisis led to protests known as the "Pots and Pans Revolution". There had been regular protests since 2008. Hörður Torfason staged a one-man protest in 2008, and invited others to speak. Following that he organised a rally every Saturday. In January 2009 the protests intensified with thousands of people turning up outside Parliament with their pots and pans. It was the largest protest in Icelandic history, and it later led to the resignation of the Government (Gunnar, 2016). Hörður Torfason spoke at Otago Polytechnic in 2018 about 'the peaceful revolution' he led in 2009 and his book on the subject is called 'Bylting' (Revolution). What happened in Iceland was about using passion and individual leadership to inspire collective action that led to a wholesale change in government and society.

It is often the case that societal change outstrips both regulatory and legislative change and sometimes these two take too long to catch up. The pace of change is critical as it can lead to tension, conflict and failure.

IMPACT OF CHANGE ON INDIVIDUALS

Change is constant in our professional and private lives. One of the key reasons why major change projects fail is because organisations fail to consider the human and personal impact of it. Many people are initially hesitant about change, even when it occurs within their personal lives. As humans, we are naturally cautious and resistant to change according to Smollen (2009).

There is a distinct difference between the change event and the emotional transition that occurs. Organisational change often creates a sense of fear of loss, which often leads to employees experiencing four emotional states according to the Kubler-Ross Grief Model (1969):

1.   Denial – The first emotional state is denial that change is occurring and fear of that impending change. It creates an almost shock reaction where people are paralysed to act and ignore the potential changes facing them.

2.   Resistance – This is often the second emotional reaction to change and can take several forms including actively opposing the change. It is important that organisations understand that forcing compliance to change may increase resistance. Individuals need to feel listened to and for their views to be considered, before resistance starts to dissipate.

3.   Exploration – This is the third emotional state where individuals really explore what the change is all about, the impact and issues for them, the opportunities and options. There may be a negative reaction to change, but if issues are addressed, trust is built up resulting in a more positive reaction to the transformation.

4.   Commitment – This is the final emotional state which is reached when obstacles have been removed and there is an emotional commitment to successfully implementing change due to the involvement of those affected.

The secret to change for us all is to focus our energy not on fighting the old but on building the new. Organisations can take several steps to help people navigate emotional transition through change and build a new future:

Cobb (n.d) outlined that ongoing communication particularly helps staff to understand why the change is necessary and how they might be affected as these steps explain:

•   Acknowledge personal loss and gain – To help employees adjust to change it is important that organisations really acknowledge and support them to deal with personal loss from the change as well as what they might gain.

•   Anticipate concerns – Think ahead and develop some frequently asked questions. Listen and address any additional issues not already covered. Reassure people that you care about the impact change has on them.

•   Communicate – hold personal meetings with groups to communicate what is going to happen before it does and take time to explain the 'why'.

•   Encourage involvement and feedback – really give an individual a mechanism to voice their concerns, get involved in the process and give their feedback.

•   Provide updates – keep communicating what is happening now and what may have changed since the feedback was received.

•   Sell the benefits of change to them – some of which include:

        - Improved communication and collaboration opportunities

        - Increased positive opportunities for growth and development of staff

        - An improvement in the working environment and efficiency of the workplace.

ORGANISATIONAL CHANGE

To be able to understand organisational change we also need to appreciate how and why organisations change. We live in an era of rapid change in technology and knowledge. Organisations particularly need to adapt, meet new opportunities, diversify, and morph into something else, more quickly than ever. In some industries, there is a need to achieve this at light speed, just to survive.

There are different models of change but one that provides three clear stages of change is Lewin's Three-Step Change Model (1951), as explored by Cummings (2015), and still has a relevance today. The three stages are:

- Unfreezing

- Moving

- Refreezing

Kotter (1996) Harvard University used Lewin's model to create his eight-step model of:

1. Establish the sense of urgency and compelling reasons for change to unfreeze the organisation.

2. Create a cross functional group to unfreeze the organisation and lead the change.

3. Develop the vision and strategy for unfreezing and moving the change forward.

4. Communicate the vision and strategy to all staff to start the movement.

5. Eliminate the barriers to change, take risk and solve problems to allow the organisation to move.

6. Create a plan to achieve some short-term wins and help the organisation pick up movement.

7. Consolidate on changes and continue other changes until it cascades throughout the organisation to achieve a refreeze.

8. Reinforce and refreeze the changes by highlighting connections between behaviour change and success Cummings (2015).

The different components of an organisation include:
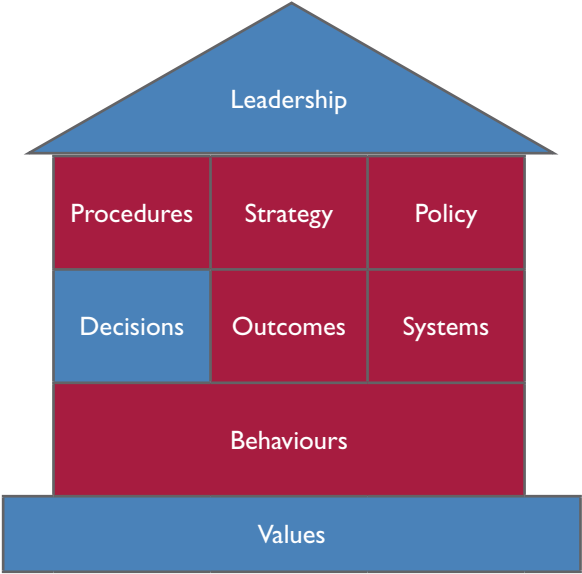
Figure 1. Foundation and building blocks of an organization (adapted from Taylor, 2005)

To succeed organisations, need to effect change in all these elements and take the lead from the foundation of values and organisational culture.

ORGANISATIONAL CULTURE CHANGE AND VALUES

Culture is about the messages sent through via our:

- Behaviours – the behaviour of others

- Symbols – events, actions and decisions that attribute meaning

- Systems – mechanisms for managing people and tasks (Taylor, 2005).

Values refer to what we as individuals, groups and organisations hold as our key principles. Our values guide decision-making, attitudes, behaviour and actions. Examples of values outlined by Taylor (2005) are:

- Accountability/Integrity

- Caring

- Compassion/Empathy

- Respect

- Passion/Enthusiasm

- Diversity

- Teamwork

- Quality

- Pride

WHY IS CULTURE CHANGE IMPORTANT?

For any organisation that truly wants to survive and succeed, the culture of an organisation cannot be ignored. A positive culture removes many stressful elements at work and turns strategy into action.

Repositioning the culture of an organisation is important for several reasons:

- It helps organisations respond faster to customer and market demands

- It increases both staff and customer satisfaction

- It better aligns strategic vision and organisational culture with behaviours exhibited by staff

- Improves the overall effectiveness of the organisation

- It leads to improved employee engagement, productivity and performance

- Creates opportunity for developing best practice in all aspects of the business

- It increases the organisation's market share

- Improves financial performance and return on investment (Expedite, n.d.).

If organisations decide not to actively work on their culture, it is very much like playing poker and your organisation's future is in the hands of fate rather than design. If we want to change the culture of an organisation, we first need to understand behaviour then how to change it, if we are to be successful. The journey of culture change starts with engaging the hearts and minds of staff to shift behaviour.

There are many theories and models that explain behaviour change, the most well-known are:

- Learning theories by Skinner (1977)

- Social cognitive theory (Bandura, 1986)

- Theory of reasoned action (Ajzen, 1980)

- Trans-theoretical model (Procheska & DiClemente, 1983)

Research by Bandura (1977) has identified one of the key elements of these theories is self-efficacy, which is the individual's impression of their own ability to perform a demanding or challenging task, such as run a marathon or finish a project. This 'impression' state is built on factors such as:

- The individual's prior success in the same or related tasks,

- The individual's current psychological state,

- The degree to which persuasion can change the individual's impression of their ability.

Self-efficacy can predict the amount of effort an individual will put in to initiating and maintaining behavioural change, and holds the key to cultural change.

With regard to learning theories, Skinner (1977) states that complex behaviour is learned through gradual modification of simpler behaviours. This includes the imitation of behaviour demonstrated by others (role-models), reinforcement of preferred behaviours and rewarding individuals when they demonstrate the desired behaviour. Each simple behaviour is established through imitation and subsequent reinforcement, which is why positive leadership role models that reward positive behaviour are essential for successful culture development.

Social and cognitive theories have been linked to self-efficacy (Bandura, 1986) focusing on what an individual thinks about their behaviour patterns, which in turn impacts on the environment in which they work. In other words, an individual's environment affects not only the individual's personal characteristics but their behaviour as well. Consequently, the individual's behaviour impacts on their environment, the workplace culture, and the way a person thinks and feels about their environment. Therefore, if an organisation can encourage its employees to display positive behaviours, they are more likely to feel better about the organisation and create a more positive workplace culture.

Ajzen's (1980) theory of reasoned action highlights that individuals consider consequences and society's reaction to their behaviour before performing it. It is important to conclude from this theory, that personal attitude and social pressure influences behaviour and consequently has the potential to drive a change in behaviour.

The Trans-theoretical model, developed by Procheska and DiClemente (1983) found there are five stages of behaviour change before the transition to the new behaviour is permanent:

- Pre-contemplation – the individual begins to identify the issue or need for change,

- Contemplation – the individual begins to think more specifically about changing a certain behaviour and the rationale for doing that,

- Preparation – the individual begins to plan their behaviour change,

- Action – the individual begins to demonstrate the new behaviour more often.

- Maintenance – success of the new behaviour begins to take hold and the new behaviour is displayed more often and becomes routine.

Personal issues and environmental changes can impact on behaviour and throw the individual back to earlier stages of the change process.

Fogg (2009) provided a definition of the motivating factors for behavioural change, which includes:

- Pleasure and pain – Emotional responses drive behaviour. People will avoid behaviour/actions that result in pain and repeat behaviour that causes them satisfaction or pleasure.

- Hope and fear – If an individual is hopeful, the behaviour is more likely to be repeated. If they are fearful the behaviour is more likely to cease.

- Social acceptance or rejection - This is one of the strongest drivers of change. In general. The frequency of a certain behaviour is increased where social acceptance is the result. Behaviour is less likely to be repeated or avoided when it leads to social rejection.

Understanding theory behind behaviour change is critical to being able to formulate successful models and actions for changing the culture of an organisation.

HOW CAN YOU CHANGE YOUR ORGANISATION'S CULTURE?

Organisational culture change is not out of reach and can be achieved by any organisation, if they continue to follow some basic principles. However, organisations may need to accept that as a consequence of change, operational norms of the business may also need to change. Those leading the change may also need to accept they will need to change their own behaviour first.

The most successful sustainable change is not something that happens overnight but is achieved over time. Eventually, this will achieve a positive effect on the organisation's culture, decision making, levels of employee engagement, employee retention, customer experience, cost effectiveness and profitability.

If you want culture change to be successful, then you need to focus on having clear boundaries for behaviour and manage issues that arise in a respectful and proactive manner. This attention to boundaries will ensure that your culture is inspired by positive behaviour rather than negative and destructive behaviours.

Organisations also need to have a comprehensive plan that includes the following key elements of organisational culture change should be:

1. **Vision** - Start by identifying the vision of what the culture should look like. Ensure this is part of your organisations ongoing strategy. What should your organisation feel like on the inside and how should it look from the outside? Your plan for culture change should include something that can be delivered easily and there is movement towards the desired culture over time.

2. **Values** - Establish the key organisation values and the behaviours that deliver on the vision. These are the building blocks of your culture.

3. **Behaviours** - Create the catalyst for change by engaging the hearts and minds of staff in both identifying and describing the values that are important. Move on to establishing behavioural norms for each value.

Ensure that employees are involved in creating the description of the desired behaviours. Identify key change champions who will encourage and lead behaviour change.

4. **Communication** - Develop a communication plan that involves different channels of communication, sharing progress, seeking regular feedback and sharing, successes and stories. Communication needs to be personalised, if it is going to influence the required behaviour change. It also needs to highlight the work and success of some of the change heroes.

5. **Leaders** - All change champions and leaders need to be engaged as role models of the desired behaviours. They need to be tasked with mentoring, coaching, developing skills and influencing others.

6. **Manage boundaries** - Be prepared to address behaviours and actions of those staff that are toxic, hostile and non-compliant with the organisation's vision and values. Should behavioural boundaries be breached you will need to have a simple, fair and respectful way to manage this breach. Encourage staff to speak up and address behaviour that does not fit with the vision. Ignoring behaviour inconsistent with the values will only dilute your culture and it may develop characteristics that are not part of the vision.

7. **Openness** - Acknowledge and address criticism to the change, do this in an open, confident and transparent way. Avoid making excuses and/or defending your position. Instead focus on everyone working together to identify what needs to be done to implement the change in the best way.

8. **Alignment** - Align the systems, policies and processes so they encourage the desired behaviour and decisions to fit with the organisation's values.

9. **Evaluate** - Regularly review your decision making to ensure that each decision supports the desired organisational culture. Also, examine and review your culture to ensure it matches the vision and take steps to get is back on course if required.

10. **Bring in new blood** - Recruit and retain new employees that share your organisation's values.

11. **Reward** - Take time to reward and recognise employees for desired behaviour. Publicise and celebrate change successes along the way.

12. **Reinforcement** - Use training, workshops, meetings and other activities to consistently reinforce the values, expected behaviours and vision for the culture (Taylor, 2005).

A SUCCESS STORY

Over the last few years, Air New Zealand has focused on an internal culture change, which has culminated in them officially receiving the Rainbow Tick Accreditation. To achieve this accolade, Air New Zealand had to meet a robust set of criteria that deems them a safe, welcoming and inclusive organisation for people of diverse gender identity and sexual orientation.

Air New Zealand adopted a Diversity and Inclusion Strategy in 2013 and since then has undergone a culture change involving staff to ensure that everyone in all communities are accepted and can thrive. McKinsey (2015) identified that the level of ethnic diversity within an organisation increased their financial effectiveness and their market share. Creating a diverse workforce that is representative of our society, underpins success in a business.

Air New Zealand developed a Pride Network run by employees that achieved great changes to attitudes by doing several things:

- Advocating for the installation of gender-neutral bathrooms.

- Creating ways for staff to identify in a gender-neutral way in the Human Resources systems.

- Setting up leader workshops to crack open bias and prejudice.

- Running successful events to promote the change in culture.

- Being involved in the Auckland, Wellington and Vancouver Pride Parades.

Like many other airlines, Air New Zealand was rather traditional and had a 'gung-ho' attitude about stereotypes. It was no mean feat to break down the biased attitudes. Culture change activities involved employees at all levels and created a wave of change across the organisation. Adopting culture change has delivered huge benefits for employees, contractors and customers. Air New Zealand is still working on its culture change process which aims at fostering a safe, respectful, transparent and welcoming workplace for their 12,000 employees. They continue to work on embedding this change, but they have achieved so much already.

CONCLUSION

Regardless of the type of organisation you work in or the type of change you want to make, the key is to set out a plan to engage the hearts and minds of your staff. Change needs to be slow, steady and inclusive; it needs to focus on encouraging behaviours in your staff that are aligned to your values. Don't give up if things go wrong, review and adjust your change until the desired state is achieved.

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MOVING ONBOARDING FROM STATIC TO STRATEGIC

Hannah Friedrich

The ability to recruit and retain talented employees is critical to future organisational success. By utilising technology, organisations can maximise engagement and success.

The author conducted a research project as part of the requirement for completing the Bachelor of Applied Management, in the School of Business, Otago Polytechnic. The main objective of this project was to identify how onboarding was currently planned and implemented at the host organisation at the focus of the research, what the challenges and risks relating to onboarding were at the organisation, if the current onboarding process aligned with best practice, and what the required developmental items of onboarding were to ensure greater efficiency, engagement, and sustainability. The author applied multiple methods of data collection which included online surveys of recently onboarded employees, semi-structured interviews of hiring managers and documentation analysis. Findings were analysed and evaluated against onboarding best practice and existing theories which produced the following themes: onboarding process, onboarding best practice and business benefit. The main findings were the lack of consistency in the current onboarding process, with timeframe, consistency of delivery, communication of expectations regarding organisational goals and job role, as well as following up on progress being identified as areas for improvement to ensure the organisation was maintaining best practice, sustainability and full engagement of employees. Based on these areas of improvement, recommendations were provided to the organisation to improve the consistency of the delivery through extending the time frame of the current process and implementing, monitoring and evaluating performance metrics during early employment. Further research into how to implement technology to drive the onboarding process was also identified. This article highlights the importance of having a formal onboarding programme in place and the effects that implementing technological solutions has on engagement and retention when managed successfully.

INTRODUCTION

Successful onboarding is a crucial part of any human resource management strategy, through the utilisation of technology, organisations can effectively integrate new employees into the organisation helping to ensure ongoing success through lowering recruitment costs and increasing retention rates (Boxall & Purcell, 2016).

Bauer (2010) defines onboarding as a process by which organisations help new employees adjust quickly to the performance and social aspects of their new jobs. Onboarding ensures new employees acquire the necessary knowledge, skills and behaviours to become productive members of the organisation. Harmon (2011) suggested that the faster new employees feel welcome and prepared for their jobs, the faster they will be able to connect and contribute to the organisation's mission and vision. A study by the Wynhurst Group found that 22 percent of staff

turnover occurs in the first 45 days of employment and nearly 1 in 3 new hires leave the organisation before the end of their first year (Burkett, 2017). Through utilising technology in people processes not only will the onboarding process be enhanced and simplified but the organisation can deliver a more consistent, measurable and effective experience for the benefit of the employer, the employee and the company's bottom line.

The author conducted a research project during her internship for a large public organisation located in Dunedin, New Zealand as part of the requirement for completing the Bachelor of Applied Management, majoring in Human Resources and Strategic Management at Otago Polytechnic. During the internship the author identified a need for an improved onboarding process to ensure greater efficiency, engagement and sustainability, and this was suggested to the Human Resources department, which already had a goal to improve their current processes and practices.

The purpose of the research was to identify how onboarding was planned and implemented at the organisation, what the challenges and risks relating to onboarding were in the organisation, if the current onboarding process aligned with best practice, and what the required developmental items of onboarding were to ensure greater efficiency, engagement, and sustainability. At present 40% of the organisation's current employee turnover are those that are within one year of employment. Therefore, the ability to recruit and retain talented employees was critical to future organisational success.

RESEARCH METHODS

The current situation at the organisation was analysed using multiple methods of data collection, known as triangulation, to gain a holistic view of the status of onboarding at the organisation and insights into the development needs for onboarding at the organisation. These methods consisted of engaging with employees through the use of electronic surveys, interviewing internal and external hiring managers, and reviewing and analysing documentation.

The target group identified for the electronic survey consisted of 78 employees across the organisation who joined the company between 31 May 2017 and 30 June 2018. Employees who joined after 30 June 2018 were excluded from the survey as it would have been too soon to evaluate their onboarding experience.

The survey was restricted in length to 15 questions in English to minimise maturation effects on the respondents and the questions were asked in the same order to ensure validity and reliability. Questions were incorporated regarding employee's feelings and experiences of the current onboarding process to provide the researcher with feedback on current processes as well as experiences from a new employee perspective.

The survey was open from the 5th of September 2018 to 19th of September 2018. During that time, all 76 employees received the invitation successfully, and 38 employees responded to the survey resulting in a response rate of 50%. The Human Resources Marketing and Communications advisor at the organisation identified that a minimum response rate of 30% was expected and considered acceptable. Therefore the survey response rate exceeded expectations.

The researcher conducted two sets of semi-structured interviews. The first set involved two hiring managers from the organisation who are directly involved in the onboarding of new employees, to provide a balance to the internal perspective with staff. The other set involved two external Human Resource professionals to gain a holistic view on current best practice relating to onboarding processes in other organisations. Each participant was asked the same six questions in the same order for consistency. These questions were aimed at understanding the current onboarding process, improvement needs and the current best practice of onboarding in New Zealand. The content of these questions guided the direction of the interview.

Along with the survey and interviews, existing company data from the same timeframe of the survey sample, July 2017 to June 2018, was analysed to gain a deeper understanding of the current onboarding process at the organisation. This data included existing onboarding material, policies, procedures, and various spreadsheets. A variety of data for analysis was obtained through these methods to investigate how onboarding was currently being planned and implemented in the company, how employees experience their onboarding and the best practices which could be implemented at the organisation. The findings from each method were collated and analysed, which produced the following themes; Onboarding process, onboarding best practice and business benefit.

ONBOARDING PROCESS

Onboarding is a process by which organisations help new employees adjust to the performance and social aspects of their new job. The faster new employees feel welcome and prepared for their jobs, the quicker they are able to connect and contribute to the organisation's vision and mission (Bauer, 2010).

Several conceptual theories relating to onboarding exist. "The Onboarding Margin" was developed by Stein and Christiansen (2010) with the goal of reaching greater execution of the strategic and business plan. This onboarding concept is based around increasing the level of productivity and reducing operating costs through four content pillars: cultural mastery, interpersonal network development, early career support and strategy immersion and direction. The Four Pillars of Effective Onboarding developed by Watkins (2013) discusses business orientation, stakeholder communication, alignment of expectations and cultural adaption, as the focus to overcome onboarding barriers in an organisation. In contrast, Bauer (2010) created the "Four C's" of onboarding: Compliance, Clarification, Culture, and Connection. These four building blocks make up what Bauer, and to that extent, many in the HR field consider a holistic onboarding process. The degree to which each organisation executes these four building blocks determines its overall onboarding strategy and determines how well they utilise onboarding as a contributing factor to their success (Bauer, 2010). Each of these conceptual theories present a slightly different approach to the fundamental elements of an onboarding programme. However, many similarities exist and are included in each conceptual theory in some form such as the importance of social connections, clarity of organisational goals and strategy, as well as clarity of job role (Stone, 2013).

The importance of social aspects was evident in both the answers from the interviewees as well as the survey participants. Most interview participants mentioned that one of the most important goals of onboarding is that a new employee should feel welcome along with socialisation and communication being of high importance. The survey respondents supported the importance of socialisation with the respondents who received formal onboarding, including various socialisation activities, having a high level of satisfaction relating to organisation and job role compared to the participants who did not receive formal onboarding. It was also found that the employees who were onboarded knew the organisational goals of his or her own unit, and how their role contributed to these organisational goals. However, the employees who did not receive formal onboarding required more clarity on these.

According to Stein & Christiansen (2010) many companies have inconsistent onboarding practices, which creates frustrating experiences for both new hires and hiring managers. This was shown with over half of the participants indicating they did not receive a planned induction which was further supported by the onboarding documentation which indicates that 35% (n=53) of new employees between July 2017 and June 2018 did not receive formal onboarding at the organisation. The employee survey revealed that the hiring managers lacked standardised information, which indicated managers were improvising their own solutions to integrate new employees, showing that onboarding practices and documentation at the organisation are currently underutilised.

Bauer (2010) discusses adequate and effective onboarding as being related to higher organisational commitment, improved retention rates and time to productivity. Based on the survey results, employees who received planned

onboarding had the best outcomes regarding engagement, effectiveness, the right level of information delivered, coverage of important tasks and overall satisfaction of onboarding. However, when evaluating the overall effectiveness of onboarding, the interview participants identified room for improvement in their onboarding process and the need to refresh out of date content through use of technology.

ONBOARDING BEST PRACTICE

Onboarding programmes can vary widely across organisations. However, there are several overarching characteristics present in all onboarding programmes such as ensuring new hires are prepared with an understanding of the overall company, general training and paperwork (Boxall & Purcell, 2016).

Onboarding best practice begins with general induction content moving to a tailored programme specifically for the individual and job role. It is a 2-way interactive process that includes a series of events using mixed methods of presentation such as social interventions, goal setting, feedback, and formal and informal training which typically runs over a time period from recruitment to twelve months, when the new hire is considered fully productive (Forry, 2017).

The current onboarding process at the organisation differs to the external interview participants' views of best practice and the literature identified. The organisation's onboarding process is one size fits all, and commences on day one, running up to a month for the checklist to be completed. The current process covers practical needs such as computers, systems and organisational content and is presented in person using PowerPoint presentations. The internal participants did not refer to any additional processes as part of the current onboarding process which aligned with the current documentation provided.

The importance of understanding who leads the onboarding process, and who controls the various steps of onboarding the new employee is vital to onboarding success and sustainability over time (Bauer, 2010). At the organisation, multiple stakeholders were identified as being involved in the onboarding process. The survey results revealed inconsistencies in the delivery, identifying that onboarding was conducted most often by the employees' own manager or colleague which was in contrast to the internal participant's responses where the Learning and Development Advisor and Human Resources were perceived as the main facilitators.

The length of formal onboarding programmes varies between organisations. Stone (2013) describes onboarding as beginning when a new employee is offered a position and ending when the employee is considered fully functional.

Data revealed differing opinions on the average time it takes an employee to be productive at the organisation, with the timeframe ranging from a couple of weeks to two months. This timeframe was much shorter than external interview participant responses. Hogan (2015) discusses onboarding being a process, not a one-time event that covers the new employee's first year addressing the whole range of employees needs such as equipment, accounts, training and networking.

Current onboarding best practice includes using milestones such as 30, 60, 90 and 120 days to follow up and check in on progress, concerns and suggestions (Stein & Christiansen, 2010). Both external participants discuss checking in with new employees' post induction on a regular basis – daily, weekly and monthly. In contrast, both internal participants agreed that no follow up was provided after the initial induction. This reveals an area for development regarding follow up and checking in on progress for the organisation to reach the current best practice.

Bersin (2002) describes the utilisation of technology in onboarding strategies as becoming the international standard discussing that with the speed of technology adoption and the global economy companies can be left behind if they do not better utilise their human capital. Stien and Christiansen (2010) further explain that through

the use of technical solutions such as the automation of information, onboarding information can be given in small doses to new employees allowing them to internalise and apply the information to their work assignments. The external participants addressed using technological solutions to onboard employees which aligned with the literature; however, more emphasis was placed on socialisation. Currently, automation and technological solutions are underutilised at the organisation which could be an area of development for the organisation as the literature identifies onboarding technologies such as driving the onboarding process through automation of documentation and induction software, as being linked to increased performance and improvements in all metrics. By utilising technological solutions, improvements in engaging and retaining employees could be achieved which would assist in accomplishing business objectives.

According to Tayeb (2003) different onboarding techniques depend on the level of a new employee's career, job function, geographic or cultural influence. Therefore, onboarding is not one-size-fits-all and different techniques will be required to ensure success.

BUSINESS BENEFIT

To ensure sustainable results an organisation needs to understand whether employees in the organisation are committed and engaged. Employee engagement is described as existing when an employee feels physically, intellectually and emotionally connected to their work in such a way that enthusiasm, energy and commitment are brought to the organisation (Mendes & Stander, 2011).

Boxall and Purcell (2016) suggest that if organisations can actively engage employees within the first year, this can result in higher retention rates and higher productivity. Therefore, it is vital to engage employees in the first year of employment as there is a limited time where employees believe they contribute, belong and are welcomed into the organisation.

All of the survey participants who received formal onboarding agreed to some extent that they felt welcome and productive at work and agreed that they had established good relationships with the key people relative to their role. However, the survey participants that did not receive formal onboarding had a lower feeling of satisfaction with the organisation and job role. These findings were also reflected in the survey participants overall experience of onboarding with the employees who received onboarding being more satisfied than the employee participants who did not. This shows the importance of the current planned onboarding process being delivered and supports the possibility of increased engagement and satisfaction should the process extend over a longer period.

Theuri (2017) noted that poor onboarding, such as not having the required tools, technology, resources and content contributes to weakening employee's commitment, therefore, increasing the risk of high employee turnover. When the survey participants were asked if personal protective equipment (PPE), hardware, accessories and/or computer accounts were ready on their first day, over half of all participants replied that they were not. This identifies an area of development for the organisation regarding pre-onboarding to ensure their new employees have everything ready to be efficient in their job.

When evaluating the overall effectiveness of onboarding most of the internal and external interview participants believed the onboarding process in their organisation succeeded well or reasonably well. However, the internal participants identified room for improvement in the onboarding process. Negative feelings towards the onboarding process were identified, with internal participants labelling it as a *"chore"* or a *"tick the box"* activity in need of improvement.

Employee turnover can be used as a benchmark indicator of the success of an organisation's recruitment, retention and engagement efforts (Boxall & Purcell, 2016). Currently, the annual turnover percentage of employees with

under one year service is trending gradually upwards with half of the overall employee turnover being employees with under one year service at the organisation. This highlights the importance of ensuring employees are actively engaged and welcomed through onboarding activities to help improve the retention of employees and reduce the costs of hiring or re-hiring.

IMPACT OF CURRENT PRACTICES AND RECOMMENDATIONS

By evaluating the findings with onboarding best practice and existing theories identified in the literature the impact of the current practices in the organisation were assessed. Despite the lack of consistency identified, the company had succeeded in the engagement of new employees who had received formal onboarding. However, some of the key onboarding activities, such as time frame, consistency of delivery, clearly communicating expectations in regards to organisational goals and job role, providing the required tools, technology, resources and up to date content, as well as following up on progress were identified as areas for improvement.

Based on these areas of improvement, the researcher provided the following recommendations for the organisation to assist in improving the current onboarding process to ensure greater efficiency and engagement.

DEVELOP PROCESSES TO ENSURE CONSISTENCY OF DELIVERY

The onboarding process is only as efficient or effective as the people involved in conducting them, so it is essential to gain buy-in from the facilitators and have clear communication. If the facilitators understand the value that a correctly held onboarding process has to the operation of the organisation, they are more likely to ensure it is completed. The starting point to achieve this is to arrange a meeting with everyone who has a stake in the onboarding process, and clearly communicate the expectations of the induction and onboarding of employees. Involving and engaging stakeholders in the process and changes is a key success factor.

As shown here - It is important to use feedback provided by the stakeholders about the current delivery. Changes can be implemented to the current induction process and eventually the onboarding process to align with the needs of the facilitators and organisations goals. Through improving the consistency of the delivery of the current induction, employee engagement and efficiency will be improved.

EXTEND THE TIME FRAME OF THE CURRENT PROCESS

Extending the time frame of the current process is recommended in order to offer pre-induction information as well as follow up and assess the new employees' integration and satisfaction with the organisation and job role. Before new employees start work all relevant paperwork for completion could be supplied alongside information about key policies and procedures on an online portal. All required personal protective wear, tools or systems needed for the job role should also be prepared before the new employee starts, so it is ready for their first day.

Facilitators could meet with new employees at key milestones, which could be time-bound such as after one month, after three months, or could be related to early performance depending on the job role.

IMPLEMENT EMPLOYEE MONITORING AND EVALUATING PERFORMANCE METRICS

Implementing employee monitoring and evaluating performance metrics during the onboarding process such as onboarding satisfaction surveys, attrition rate measurements and engagement surveys is also recommended. These metrics would provide potentially invaluable information about the impact and benefits of the redeveloped onboarding programme. Utilising this data would help prioritise future onboarding activities and provide the business with tangible development needs to ensure their new employees are efficient and engaged.

The starting point to achieve this implementation is to nominate an employee to lead and be accountable for the performance metrics, followed by arranging a realistic time frame for conducting metrics such as bi-annually or annually. It is important that once the data is collected that the findings are shared so the areas of development identified can be improved. A bi-annual or annual report on performance metrics would therefore be beneficial, depending on the time frame the organisation has set for conducting the metrics.

CONCLUSION

Successful onboarding is a vital part of any human resources management strategy. With the high cost of recruiting, organisational leaders need to understand that it is essential to effectively integrate new employees into the organisation to ensure future success. With the speed of technology adoption and the global economy, the global workplace will only continue to grow in size and diversity and organisations could be left behind if they do not better utilise their human capital.

The research identified the importance of having a formal onboarding programme in place and highlighted the effects that implementing technological solutions in the onboarding process has on engagement and retention when managed successfully. It is recommended that further research examines e-orientation and onboarding including the effectiveness of monitoring individual onboarding progress on automated reports and the impacts technology-based onboarding programs have in assisting moving onboarding from a static process to a strategic process.

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EMPLOYEE WELFARE: DEVELOPING CHANGE STRATEGIES TO ADDRESS EMPATHY BURNOUT IN CARING PROFESSIONS

Samuel Turner & Dr Lesley Gill

INTRODUCTION

The general health and wellbeing of an organisation's workforce, also referred to as employee welfare, remains a crucial component in organisational and leadership planning. At the level of an individual, welfare is often related to one's level of satisfaction, engagement and dedication. At the organisational level, welfare can be associated with productivity, turnover, and employee relationships. An employee's welfare, particularly in a caring profession, is often subject to the emotionally demanding needs of their patients, which significantly affects their ability to remain empathic and compassionate towards others, and themselves. Empathy, like any emotional resource, can be exhausted if not replenished often. Compassion fatigue, also known as empathy burnout, is an emotional state experienced by those working in emotionally demanding roles, such as healthcare professionals, police service and social workers. The common symptoms of empathy burnout include depression, anxiety, absenteeism and lethargy. At an organisational level, it is imperative that leadership decisions consider the implications of their profession to the wider workforce, and so develop strategies to prevent empathy burnout. This paper explored the perspectives of employee welfare at a local hospital to develop strategies for change that may assist caring professionals in managing their stress and maintaining levels of empathy. From the exploratory research project, strategies emerged that could be actioned to improve employee welfare across the organisation. These strategies for change included strengthening communication lines to eliminate barriers to support, bolstering the existing employee assistance programme, developing resilience training schemes, and closing the gap between executive leadership and staff. Caring professions are positions/roles including but not limited to nursing, clinicians, physicians, paramedics, mental health employee, caregiving, counsellors, physiologists, orderly and welfare officers.

Emotional intelligence research remains an area of interest across industries, particularly in human resources management and the healthcare industry (Kurup & Rishi, 2016). The need for this research originated from the desire of a Health and Safety Manager to understand the current state of employee welfare within their organisation, and explore related benefits available in their workforce. The aim was to understand perspectives of employee welfare at the hospital at the focus of this research, and compare findings between managerial and non-managerial employees. To achieve this aim, a series of semi-structured interviews and quantitative surveys were undertaken with hospital employees including those working in clinical areas, management and administration. Though the sample size of this research was small, the findings revealed a valuable snapshot of employee welfare within the hospital, and and potentially, wider implications.

The questionnaire items that were developed from existing research, assessed three specific themes: employee welfare, empathy burnout, and employee engagement. Initially, the results were indicative of systemic challenges around communication channels and power distance with leadership, further analysis revealed that despite the challenges, employees demonstrated an awareness of others and the ability to identify signs of empathy burnout, particularly in clinical areas. This was indicative of strong collegial support across the departments with a general understanding of the role and its associated risks of burnout. These findings from the survey and semi-structured interviews were valuable tools in developing potential strategies to evaluate and change processes to better suit the needs of the workforce.

At the focus of the research were employees from the emergency department, human resources, occupational health and safety, and clinical administration. The purpose of collecting samples from these departments was to widen the scope of research and explore and compare perspectives from clinical, administrative, supportive, managerial and non-managerial employees.

LITERATURE REVIEW

Employee welfare

Kurup and Rishi (2016) describe employee welfare as the general health and wellbeing of an organisation's workforce that requires constant focus in organisational decision making and planning. To manage and reduce the risk of burnout and fatigue, Baldschun (2014) suggests welfare-related strategies be implemented at the earliest point of the employee's journey and take a proactive approach to maintaining welfare. Similarly, Robertson and Cooper (2010) discussed a hedonic approach to addressing the psychological welfare of employees. This approach focuses on non-monetary benefits to develop the awareness of mental health and build resilience through positive experiences and strength-based training. As supported by Pawar (2016), improving the psychological welfare of an employee has proven results in the quality of work provided by a 'healthy and happy' employee. In a study exploring the perspectives of childcare workers, Baldschun (2014) found a strong relationship between the welfare of employees and the resulting welfare outcome for patients. For example, a healthcare professional working overtime without adequate rest breaks is likely to provide poor quality of care to their patient (Baldschun, 2014). Further, Robertson and Cooper (2010) and Pierre and Tremblay (2011), argued that managers are responsible for the welfare of their employees and must do all that is practicable to reduce the risk of psychological difficulties that may result in disengagement, empathy burnout and employee turnover. Taking preventative steps such as introducing welfare benefits means managers are empowered to improve the welfare of their workforce (Pierre & Tremblay, 2011; Baldschun, 2014). It is important for leadership to prioritise the needs and interests of employees to improve the health and wellbeing of an organisation's workforce and take practical steps to retain valuable employees. Developing a stronger focus on employee welfare and implementing benefits (such as resilience training, additional sick leave, and basic amenities, positively influences the engagement, satisfaction, quality of work and mental health of a workforce (Robertson and Cooper, 2010).

Empathy burnout

Empathy burnout is described by Hojat (2009) and Johnson (2013) as a type of emotional stress and exhaustion widely experienced by caring professions where high levels of empathy and emotional intelligence are needed. Hofmeyer et al. (2016) describes empathy burnout as "…nurses losing their nurturing ability toward patients, toward colleagues, and toward themselves" (p. 203). Symptoms of empathy burnout may include depression, anxiety, irritability, apathy and physical fatigue (Gill, Schaddelee, Ramsey, Turner & Naylor, 2018).

Within the context of a hospital setting, factors such as high caseloads, time pressures and unfavourable working conditions may negatively influence an individual's capacity to be compassionate and empathetic towards their patients, and themselves (Kliener & Wallace, 2017). Employees that work in high-stress environments, particularly with vulnerable clients and/or customers, are predisposed to experiencing multiple types of burnout (Gill, et al., 2018). For managers to reduce the risk of their employees experiencing empathy burnout Kliener and Wallace (2017) suggest engaging employees in self-care and self-awareness education practices to increase their resilience, raise awareness of empathy burnout, and better equip employees to manage their own stress and reduce their

risk of burnout. Schwerman and Stellmacher (2012) stated improving the support of colleagues and increasing the quality of communication at all levels of an organisation enables employees to share their experiences with others in similar work environments. Furthermore, Thompson (2013) found that providing employees with an opportunity to share with others – particularly those in caring professions – reminds them of why they entered the profession and gives them a renewed sense of value and compassion to carry into their work.

Employee engagement

An emerging phenomenon and current 'buzzword' in business and psychology literature is Employee Engagement (EE). This is a term that has generated significant interest in the business and human resources community (Zhang, Avery, Bergsteiner & More, 2014; Ünal & Turgut, 2015; Iqbal, Shabbir, Zameer, Khan, & Sandhu, 2017). Zhang et al. (2014) describes EE as, "a heightened emotional and intellectual connection that an employee has for their job, organisation, manager, or co-employees that, in turn, influences their ability to apply additional discretionary effort to their work" (p. 271). Gupta (2015) found that EE could be a tool used to measure the degree to which employees are involved in decision-making and organisational development, instead of completing their assigned roles without the opportunity to influence decisions and planning. Zhang et al. (2014) noted that EE is associated with positively influencing employee turnover, satisfaction, productivity, performance and absenteeism. Similarly, Bakker, Albrecht and Leiter (2011) found that employees that experience high levels of engagement exhibit attentiveness in their work, improved attention to detail, and as a result, their quality of work. Organisations that adopt a programme to assist planning and implementation of employee engagement strategies see an increase in employee satisfaction, trust and dedication (Bakker, et al., 2011). According to Gupta (2015) to improve EE, there must be a significant focus on encouraging employees to become involved in decision-making, creativity, innovation, educational opportunities and communication. Thus, managers are likely to experience an increase in emotional and intellectual commitment from their employees (Iqbal, et al., 2017). The advantage of an engaged and committed workforce is that it provides management with another valuable resource for decision-making and planning processes, as employees are encouraged to become involved at different levels of an organisation (Iqbal, et al., 2017; Ünal & Turgut, 2015).

Fully engaged employees who are energetic and enthusiastic are more predisposed to perform Discretionary Service Behaviours (DSB) for their colleagues and organisation (McShane, Olekalns & Travaglione, 2013; Selander, 2015). Similar to organisational citizenship, McShane et al. (2013) describe DSBs as the degree to which an employee feels emotionally connected to an organisation and feels the desire to assist customers and colleagues beyond their normal requirements. In contrast with Bhaskar and Khera (2014), Salwendar (2015) described DSBs as the positive and negative intent to perform outside their explicit job descriptions, including, and not limited to bending the rules or violating procedures for customer satisfaction. Selander (2015) found that employees who are fully engaged are likely to over-work, lose track of time and sacrifice their own well-being for the sake of others. Though employees whom are proud and dedicated to their work, employees performing DSB's are likely to experience burnout if working overtime becomes the 'norm'.

Though employee engagement can be positive for an organisation, Selander (2015) argues that managers must take practicable steps to ensure a sustainable level of engagement where the concepts of vigour, dedication and absorption are reflected. Managers that invest time and resources in EE see a positive increase in employee satisfaction, dedication and emotional connection to their work. However, there must be a balance between what is sustainable and realistic for employees (vigour, dedication and absorption), and avoid narrow approaches to engagement where the needs of the organisation are above those of employees (Bhaskar & Khera, 2014).

RESEARCH METHODS

To compare perspectives of employee welfare, the research comprised of two methods: semi-structured interviews and an electronic survey.

Survey

The survey questions were formulated from existing research found in the literature and prior research undertaken by the hospital. The questionnaire aimed to assess the themes described in the literature review: employee welfare, empathy burnout and employee engagement. To minimise maturation effects on respondents, a maximum of twenty-five closed-ended questions was allowed, with an expected duration of ten minutes (Mauceri, 2016).

Of the twenty-five questionnaire items included in the survey, five questions measured demographics; four questions measured respondents' knowledge and use of the organisation's welfare-related benefits; five questions related to each literature theme; and one question asked the respondent to write additional comments relating to their perspectives of employee welfare. As described by Mauceri (2016), the respondents were asked to rate their answer on a Likert Scale containing 5 items; strongly disagree; disagree; neutral; agree; and strongly agree. The Likert Scale enabled the researcher to find the average answers among respondents, and draw clear comparisons between data sets (Mauceri, 2016).

At the focus of the survey was non-managerial employees in the emergency department and the clinical records department with a collective sample size of 115. The purpose of using these departments was to gather clinical and non-clinical employee perspectives of welfare to later compare with the interview results. Of the 115 email invitations distributed, 64 (r.r. 56%) surveys were returned. Due to concerns of reliability and validity, four responses were removed from the sample (n=60) recorded.

Interview

As described by Niedzwiecki and Nunnally (2017), the researcher followed a semi-structured format where the questions were prepared before the interview and the interviewee was asked to answer open-ended questions specific to the research topic. The interviews were undertaken to collect data from Human Resources (HR) and occupational Health and Safety (OHS) managers, where they were asked ten questions relating to their perspectives of employee welfare-related policies and processes.

The interview questions were formulated from existing literature research and prior research undertaken by the organisation. The interview questions aimed to assess the literature themes described in the literature review. To minimise maturation effects on interviewee responses, the interview was kept to a maximum of ten questions. Of those ten questions, five reflected employee welfare; two questions measured compassion fatigue; two questions measured employee engagement; and one question provided the interviewee the opportunity to comment.

Approximately six HR and four OHS personnel were invited to participate in the interviews. The maximum duration of the interviews was 30 minutes and interviewees had the opportunity to opt out or ask any questions before the interview. Of the ten potential interviewees, nine accepted the invitation.

FINDINGS AND DISCUSSION

To identify themes in the results, a comparative analysis was undertaken to assess the differences and similarities in responses from survey respondents and interviewees. The predominant themes that emerged from the research findings were self-awareness, communication and leadership. The employee assistance programme is also discussed as it was a common theme among the interviewees.

Self-awareness

Self-awareness was evident in many survey respondents (60%, *n*=36) where they said they feel confident in managing their personal work-related stress and fatigue. Miksch, Lindeman and Varghese (2015) defined self-awareness as the degree to which an individual is aware of their own cognitive function and emotional processes. Timmins (2011) described self-awareness as "a continuous and evolving process of getting to know who you are" (p. 33). Survey respondents (64%, *n*=38) also demonstrated self-awareness when asked if they are adequately equipped to identify symptoms of stress and/or fatigue, which indicates a perceived awareness of one's cognitive and emotional processes. Hölzel, Lazar, Gard, Schuman-Olivier, Vago, and Ott (2011) state that individuals with high self-awareness are likely to identify emotional stress in others. It is reassuring that over two thirds of the survey respondents (70%, *n*=42) said they felt confident in identifying emotional stress in others. Just under half of the survey respondents (45%, *n*=27) said they would talk to someone when they are struggling with their workload. While respondents showed self-awareness of their stress, they said they were much less likely to ask for help, or recognise their high workload until they were stressed, and so their ability to identify *when* they are struggling may be limited. Griffith and West (2013) noted that self-aware individuals are likely to approach someone when they are struggling with difficult situations or tasks. However, Hofmeyer et al. (2016) stated that healthcare employees are likely to care for others, regardless of the potential personal cost to themselves. According to Wood et al. (2017) and Engle et al. (2017), healthcare employees are predisposed to experience symptoms of compassion fatigue as they operate in a challenging and complex environment where their primary focus is patient care.

Self-awareness is noted by Wood et al. (2017) as one of the primary traits of a resilient person, as it requires the person to have the ability to focus inward and acknowledge one's emotions. Interestingly, the survey respondents' answers to self-awareness seemed to contradict their understanding of their own resilience. From another perspective, survey respondents' inability to enforce positive change or working conditions might indicate self-awareness and resilience in managing long-term stress. Hofmeyer et al. (2016) argued that leaders' responsibility of their employees is particularly important in healthcare industries where symptoms of compassion fatigue are prevalent.

Survey respondents that demonstrated high levels of self-awareness of others (88%, *n*=53), and the willingness to help their colleagues (88%, *n*=53), suggests high collegiality or a mutual understanding of the work environment and identified ways to reduce stress. According to Griffith and West (2013), self-aware individuals are likely to show compassion and empathy towards their colleagues, as they become more adept at identifying emotional stress in others. Conversely, Engle, Peterson, McMinn and Taylor-Kemp (2017) found employees that were low in self-awareness experience poorer relationships with their colleagues. If an individual does not understand the emotional stress of others on a cognitive level, they lack the aptitude to identify when a colleague may be struggling. Additionally, Timmins (2011) and Kemerer and Cwiekala-Lewis (2017) argued that self-awareness is vital for developing one's communication skills and interpersonal relationships.

Communication and leadership

Of the 60 survey respondents, 46% (*n*=28) said it was difficult to speak up if they perceived a problem; although 35% (*n*=21) said they would speak up. This may indicate that employees are aware of their situation, but there are barriers in communication, or they lack the power to change their circumstances. Timmins (2011) and Kang and Sung (2017) argue that effective communication is at the forefront of successful relationships in an organisation,

where trust, transparency and appropriate behaviours that unite employees. According to Zheng, Molineux, Mirshekary and Scarparo (2015) good communication is closely linked with employee welfare as employees are likely to approach their colleagues or leaders with ideas or concerns.

As described by Kang and Sung (2017), and Kemerer and Cwiekala-Lewis (2017), leaders are responsible for ensuring clear lines of communication throughout an organisation, and the resources to manage emotional stress and fatigue as captured in this interviewee's comment:

> The employer loses credibility when they are not transparent. Executive Leader-
> ship Team (ETL) are so far removed from employees that they aren't trusted
> anymore. You must earn the trust of the employees. Leaders must demonstrate
> [organisational] values and behaviours.

In relation to the survey findings, 50% of survey respondents (*n*=60) said they do not feel appreciated for the contribution they make. One reason for this may be that employees are receiving limited feedback and are unsure of their place or performance in the organisation. According to Zheng et al. (2015), open and honest feedback enables employees to learn from their mistakes and thrive in their respective industries. Half of the interview participants said they felt underappreciated due to the lack of clear communication or feedback from their leaders. One managerial perspective from the interviews suggested the distance between leadership and employees was a contributing factor to the gap in communication:

> Loyalty and respect towards staff is so important. Distance between ELT and
> staff is huge. ELT should show support - show that they are part of the staff.
> Approachability visibility and connectivity. Ensure employees are listened to and
> heard.

Employees said they were aware of their colleagues and felt confident in identifying stress in others. However, the results indicated potential challenges to communication where a mixed response (52%, *n*=60) felt comfortable reporting concerns about others' safety, while only 53% (of that 52%, *n*=60) said they would report concerns about themselves. One manager said in an interview:

> Communication gets lost. Some areas are good, some are not so good. Informa-
> tion is not filtered down from managers to employees. Employees might get a
> message to managers, but it may get blocked. Messages get lost and just get
> forgotten or perhaps not seen as a priority.

The link between communication and leadership was established in the survey, where less than half of respondents (43%, *n*=60) said that leaders communicate well, and that employees generally know what is going on. If there is fault in communication, Aas et al. (2008) noted that monitoring and implementation remains the responsibility of leadership (Zhang, et al., 2014; Timmins, 2017). When employees are engaged in the process and given opportunity to communicate openly with leaders, positive increases in welfare, turnover and performance are observed (Zheng, et al., 2015). Many survey respondents (67%, *n*=60) said they felt committed to their work when management encouraged them to contribute to decision-making as this next interview comment suggests:

> Internal emails and intranet - good for me when I'm at my computer all day.
> Not everyone gets a chance to view these emails. I don't think the communica-
> tion gets there. Nurses are too busy to see messages, posters and training. TV
> screens are great, but most information is through emails and Pulse.

Not everyone sees information around the hospital. Not every nurse or doctor gets to see this information as they are so busy and short staffed. According to Celma, Martinez-Garcia and Raya (2018), socially responsible leaders take initiative when implementing communication models, ensuring it addresses the needs of all employees. Models

that are open, versatile, and flexible positively correlated to improving quality of work and employee welfare, as employees felt trusted and valued (Mathews & Crocker, 2016; Celma, et al., 2018).

Employee assistance programmes

The interview findings appeared to be concerned around the Employee Assistance Programme (EAP) currently available to employees, and that staff need to know about it. Kurup and Rishi (2016) argued a strong presence of employee welfare activities and benefits increases trust and satisfaction among employees. Additionally, Ganesh (2017) noted that a flow-on affect from such welfare benefits can be observed through positive increases in performance, engagement and development. According to Shapiro, Carlson, Astin and Freedman (2005), communication and transparency are key to building trust in the employee-employer relationship. In the survey, 31% (*n= 19*) of respondents said they were aware of EAP, and of those respondents only 17% (*n*=10) had used the service. This was further captured in the interviews:

> It is underutilised. Not well communicated. There is a general lack of awareness.
> I am obliged to refer employees, though I don't think EAP is effective. I don't
> believe in the service they provide as there is no way to follow up, no reporting
> whatsoever.

Employees are likely to participate in welfare-related activities if they are made aware of what they are and given an opportunity to contribute to the selection of appropriate activities that addresses their needs (Mathews & Crocker, 2016). Mathews and Crocker (2016) suggest encouraging employee buy-in where they engage at the planning level, and work together to develop activities best suit their needs. As described by one interviewee,

> We need more initiatives. Communicated well, and ensure awareness is high.
> Different things will improve culture in the organisation, and people would hope-
> fully buy into it.

Shapiro et al. (2005) suggest that leaders need to encourage engagement and buy-in from employees, enabling leaders to demonstrate willingness and transparency to follow through with employee requests. As described by Réka and Borza (2012), follow up is a crucial component in effective communication, particularly across diverse organisations. Additionally, Minter (2010) states that seeking feedback is key in improving processes in an organisation. A lack of reporting and followup was reported by an interviewee:

> EAP has no current measures, so not sure of its effectiveness. Reports could be
> useful to see the number of employees that go through.

Although the service provided by EAP is confidential, there is a general understanding by interviewees that there needs to be a follow-up process where managers may assist their employees further. For managers to ensure the effectiveness and availability of resources, Engle et al. (2017) argues that a 'next-step' of seeking feedback is necessary to match support systems with employee needs. As one interviewee stated:

> Often, we don't know anything. It is a confidential service. Lack of reporting
> merics (EAP) means we don't know how else to support them if we don't know.
> Employees don't necessarily tell us, so how can we assist them further? There is
> no current followup process.

As described by Ganesh (2017), employees are vital to the organisation's success, and must be nurtured and supported well. Programmes such as EAP, though valuable to employees, must be assessed, evaluated and communicated effectively.

CONCLUSION

The research methods used to gather data and achieve an understanding of the perspectives of employee welfare included a survey distributed to non-managerial employees in the emergency and clinical records departments; and interviewing managerial employees in the human resources and occupational health and safety departments. The scope of the research involved a collective sample of 125 from various departments. The survey results included 60 responses. Following an analysis, three predominant themes were identified as self-awareness, communication and leadership, and employee assistance programmes.

The survey revealed a positive level of self-awareness in relation to the workload or seeing emotional stress in their colleagues. However, only half of respondents said they would communicate if they perceived a problem, indicating potential barriers to communication or a perceived distance between leaders and employees. Thus, employees have awareness of themselves and their colleagues, but face challenges in communicating these needs to management.

The interviewees revealed similar perspectives in relation to communication, where the current communication models are not sufficient to address the needs of a diverse organisation. Leadership may be contributing to this dilemma, as the perceived distance between managers and employees discourages people to come forward. The perceived ineffectiveness of the Employee Assistance Programme was another contributor to employee welfare, as there appears to be inadequate follow-up processes or reporting metrics.

Given the link between the resulting themes from the results, the change strategies identified in this research are: (1) Identify and implement ways of increasing employee engagement; (2) Create opportunities for managers and staff to communicate effectively to identify employee needs; (3) Evaluate the EAP programme to increase its effectiveness to the people who need it the most, while (4) Designing systems that appropriately support people who experience stress and empathy burnout in the course of their work, will dramatically increase employee welfare in caring professions.

An opportunity for future research would be to extend the scope of the research to multiple departments and include perspectives from senior and executive leadership, particularly to understand perspectives of employee welfare at a strategic level.

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COMMUNICATION AND CUSTOMER RETENTION: A CASE OF AN ACCOUNTING ORGANISATION

LeWen Tran and Dr Ehtasham Ghauri

INTRODUCTION AND AIM

One of the key factors for the success of any business is client retention. The purpose of this research is to explore an organisation's use of communication to engage their clientele and its effects on client retention. This is determined through the client's continued use of provided services. The organisation in this research is XY, a business advisory company based in New Zealand. Their services include: accounting, business systems solutions, human resources, payroll, taxation, wealth management and training. In 2018, XY had four partners and 50 staff in Dunedin, and 10 staff employed overseas, focused in all areas of business advice. They appreciate the role their staff play in helping their clients and communities.

The mission statement for XY aims to provide services that surpass the expectations of their clients and to help those clients become more profitable. To achieve this aim, the staff and clients have to communicate with one another to gain an understanding of the client's needs and thus tailor services to the best of their ability. When this communication is achieved the satisfied client will likely continue using the offered services. XY would like to know if any improvements could be made to enhance the engagement between themselves and their clients.

The aim of this project is to gain an understanding of the impact client engagement has on client retention at XY. The catalyst for this research was to discover if XY engaged their clients enough in terms of contact frequency, and if the selected methods of communication were adequate for their client base.

RESEARCH QUESTION:

How does current engagement levels of retention influence client retention at XY?

In particular:

- What engagement methods are being used by XY to engage their clients?

- How satisfied are PH's clients with the amount of engagement occurring between the two parties?

- What relationship exists between the amount of engagement from XY and client retention?

The engagement method refers to the communication tools used between the client and the business, for example, phone, face-to-face and email.

LITERATURE REVIEW

The themes of this literature review are client engagement, communication methods, customer relationship management, and client retention. These themes assisted in the process of creating appropriate questionnaire and interview questions.

Client engagement

The term client engagement does not have a definition that all researchers can agree on. Vivek, Beatty, and Morgan (2012), define client engagement as the degree to which an individual participates and connects to activities that an organisation offers, initiated by the customer or the business. Jones (2010) views it as the quality of interactions and delivery of relevant products and services that are of benefit to the customer. Engaged customers are those that are loyal to the business and recommend a company's products and services to others according to Roberts and Alpert (2010). Engagement has to provide value, be appropriate and achieve the needs and goals of the customer. Once these are achieved, the customer will be satisfied (Jones, 2010).

Roberts et al. (2010) described customer engagement as a five-level process. Level 1, the customer uses the product or service offered. Level 2, the customer is loyal to the product or service and continues to use it. Level 3, the customer uses other products or services provided by the company. Level 4, the customer endorses the products or services to others when given the chance. Level 5, the customer promotes the product or service at every opportunity (Roberts et al., 2010). Customers that are actively involved in a service process show higher satisfaction levels and are considered more loyal than other customers (Rehnen, Bartsch, Kull, & Meyer, 2017). Marketing is a key player in engaging clients. It brings awareness of other services or products that the business can provide, thus affecting what they purchase (Roberts et al., 2010).

There is very little research around how much engagement a business providing financial advice to customers should have. The level of engagement is important as this could affect the type of relationship a business wants to form with their clients. The less contact the business has, the less involved the client is; the more distant they feel. Increasing the amount of communication between two parties can result in an improved relationship, as there are more opportunities to build trust (Hannan, Suharjo, Kirbrandoko, & Nurmalina, 2017). A research conducted, involving 1,099 clients of 129 accounting firms, found that the clients wanted the accounting firms to involve them more (Nixon, 2011). The clients wanted more knowledge and information in advance before issues could arise. Regular communication with clients increases the opportunities for the firm to build stronger relationships with those clients. Effective communication provides a further benefit as clients feel like they are able to openly express any concerns they may have (Nixon, 2011).

For this research, the term client engagement will refer to the use of communication to involve clients in a business. The aim of this engagement is to form a relationship that is mutually beneficial for both parties.

Communication methods

Communication is defined as a process by which two parties can exchange information through a system, whether it be a sign or a behaviour. This process is the main way a business can engage their clients. The interaction model of communication is a model that shows the communication between the sender and the receiver who are participants of the interaction (Tripathy, 2018). The sender is a person who is trying to communicate a message to the receiver. The receiver receives the message and tries to process what is being communicated to them. The sender encodes a message that the receiver has to decode. This communication is transferred via a communication channel. Communication channels are the different methods that businesses use to communicate with its target market (Danaher & Rossiter, 2011). There are a variety of methods available, but each method conveys the message in a different way (Sinha, 2012).

According to the media richness theory, there are two main types of media, a rich media and a lean media (Aljukhadar, & Senecal, 2017). A rich media is used to communicate information that can be found as confusing or hard to explain in a short amount of time (Stone, 2012). Lean media is used to explain information that is not confusing and understood by any party they are communicating with (Kishi, 2008). The richness of media has an effect on the clients' choice of communication channel, quality of decisions and the clients' satisfaction (Lee, Kozar, & Larson, 2009). Television advertisements and radio are used as a form of lean media, as it reaches a range of people that can understand the information. Face-to-face and telephone communication are the richest forms of media, allowing for immediate feedback, where the other party can clarify the point they are trying to convey (Stone, 2012). Written forms of communication have a varied amount of richness (Stone, 2011). Letters that are specifically written for an individual are richer than one written for a general group of people. Lean media does not allow for immediate feedback or verbal and non-verbal cues that a richer communication method may have (Stone, 2012).

Receivers of communication require a gain of information, knowledge and understanding. From previous research, it has been found that communication is only effective if the communication method being used is one that the receiver of the message prefers (Danaher & Rossiter, 2011). Kiwis Count (2010), a New Zealand (NZ) State Services Commission, conducted a questionnaire to seek how NZ citizens preferred to deal with public services. Their research found that NZ citizens preferred using face-to-face contact followed closely by phone calls and emails. Businesses are continually developing the way they communicate and engage with their clients. Businesses can form relationships with their clients by communicating with them appropriately. Accounting firms often use newsletters to engage their clients, as they typically find this form of communication shows the company's expertise and knowledge, while also helping to promote other potential services the business could provide (McColl-Kennedy, Sweeney, Soutar & Amonini, 2008; Cameron & Reeb, 2008).

Customer Relationship Management

Customer relationship management is viewed as the process, thought of development and management of relationships with customers (Laketa, Sander, Laketa, & Misic, 2015). Business cannot survive without customers; therefore a firm's sustainable existence depends on creating and retaining their customers. Retaining clients requires a business to have processes in place to repeat business with the organisation (Nixon, 2011). Forming a good customer relationship is a key concern for business managers as it is part of the retention process (Cheng, Chen & Chang, 2008). Their goal is to attract and keep these customers who will become the organisation's true customers (Siriprasoetsin, Tuamsuk, & Vongprasert, 2011). True customers are those who become loyal to the business. Attracting these customers occurs through the management of customer-related activities, like sales, marketing, service and support. These tasks aim to find and retain the more profitable and help the less profitable customers (Wang, 2012). There is limited research around the area of customer relationship management in the professional service industry, especially the business advisory sector (Walsh, & Gordon, 2010).

Businesses should focus on forming relationships with their customers rather than just focusing on the transactions that occur between them (Zeithaml, Bitner, & Dwayne, 2009; Akbari, Kazemi & Haddadi, 2016). There are many businesses, such as accounting firms that offer the same types of services. This means they all compete for the same customer market. Bilateral communication between the client and business is required to gain the trust of the client (Hannan, et al., 2017). Relationships are formed from communication, turning customers into business partners. Through client engagement, the business is motivated to keep improving the quality of their services in order to retain these 'partners' (Hannan, et al., 2017; Nixon, 2011).

Client retention

Businesses providing products or services intend to expand and retain their customers. In the financial services sector, gaining a new customer is thought to cost the business up to 14 times more than retaining a current one (Jones, 2010). Keiningham and Aksoy (2009) commented that approximately 20 percent of customers are profitable, 20 percent will cost money to keep and 60 percent will pay for themselves while returning marginal revenue. Retaining clients will help a business become more profitable. When clients and the business form a good relationship, the client is inclined to spend more, increasing the business' profitability (Hayes, 2008). Jones (2010) suggests that organisations providing financial services should aim to keep their profitable customers, help their marginally unprofitable customers to become more profitable, and decrease the amount of resources spent on the costly ones. When clients become loyal to a business they will continue using the services provided, resulting in a retained client (Roberts & Alpert, 2010). The engagement between businesses and clients does not always lead to a loyal client (Jones, 2010).

Customer loyalty is the intention of an individual repurchasing products and services provided by a business (Pi & Huang, 2011). This concept is important to businesses as loyalty results in clients willing to spend more, increasing the businesses revenue and effecting client retention (Hannan et al., 2017). Loyalty has two aspects to it, behavioural and attitudinal. Behavioural loyalty is shown through the client's actions, which includes repeat of purchases, prone to being attracted to competitors in the market and engaging in word-of mouth marketing for businesses (Szczepanska & Gawron, 2011). Attitudinal loyalty is the client's emotional commitment which is measured through repurchase intentions (Brunner, Stocklin & Opwis, 2008). There are different factors that can affect the loyalty of clients.

For clients to become loyal to a product or service they have to experience it first. Customer satisfaction is referred to as how content the customer thinks they are with the product or service they have purchased (Stan, Caemmerer, & Cattn-Jallet, 2013; Kaura, Prasad, & Sharma, 2015). The quality of services provided is important in making clients satisfied. If the quality of service they received meets the clients' expectation, they will likely be satisfied with the service and continue using the business (Jayawardhena, 2010). Satisfaction will also result in recommendations of the products and services to their friends and associates, expanding the businesses customer base through word of mouth (Bose & Rao, 2011; Akbari et al., 2016).

Companies may have reward programs in place to retain their clients. Some banks are increasingly dissatisfied with their loyalty programs as it is expensive to set up and run. Well managed programs increase customer satisfaction, helping the business gain and retain good customers (Jones, 2010). It was found that customers who were able to redeem rewards from the program were more satisfied than those who could not (Jones, 2010). In the banking sector in India, service quality, convenience and the fairness of price were important factors in gaining customer loyalty where multiple businesses were offering the same services (Kaura, et al., 2015).

RESEARCH METHODS

The goal of the research was to understand XY engagement with their clients. To achieve this objective, the research employed an action research approach to explore the influence of client engagement on client retention at XY. Action research approaches require a research process on the particular area of interest for the entity (Kumar, 2011). The results were evaluated to develop processes which improve the organisation to become more efficient (Eikeland, 2012). The research tools utilised in this study were a questionnaire and interviews. These two techniques were conducted simultaneously using a mixed research method. A concurrent mixed research method is the use of both quantitative and qualitative elements in a research effort at the same time (Schoonenboom & Johnson, 2017). Using multiple research methods allows for increased validity of the results collected, also known as triangulation when two or more methods target one phenomenon (Grafton, Lillis, & Mahama, 2011).

Triangulation in a research study allows for the convergence of results collected through different research methods studying the same research issue. This approach is likelier to result in reliable, credible and confirmable information (Abdalla, Oliverira, Azevedo & Gonzalez, 2018; Bailey, 2018). Brannen (2005) states that triangulation allows: corroboration- getting the same results using different methods, elaboration- results giving examples of why

something is occurring in the situation, complementarity- using different research methods emphasises an aspect during research, and contradiction- results from different methods reveal (…and might partially) cause opposing outcomes. Using questionnaires and interviews in this study meant that the data collected were very likely to be independent of each other.

Questionnaire

The questionnaire consisted mainly of closed-ended questions with one open-ended, and took approximately five to ten minutes to complete. Having an online questionnaire in this research helped save resources such as time and financial costs, while giving access to a larger audience (Kumar, 2011). Kumar also states that an online questionnaire enables greater anonymity for the respondents, giving rise to more honest answers, as they feel they can answer freely.

At the time this research was undertaken, the level of engagement directly affected the clients using the services provided by XY. Therefore, the online questionnaire was intended for this population. The questionnaire was designed to gain an understanding of the usual amount of interaction, what interaction method the clients preferred and if they planned to use the services again. Some of the questions formulated for the questionnaire were based on previous studies on customer service and its effect on client retention (Keiningham, Cooil, Aksoy, Andreassen, & Weiner, 2007). This was so that results were more credible. XY staff, Otago Polytechnic supervisors and trusted significant-others reviewed and edited the questionnaire to ensure that the questions were understandable. An ordinal scale of continuous measures and Likert questions were used to gain an understanding of how clients perceived the engagement and communication channels used by XY.

One-hundred-and-thirty main clients were randomly selected using a random number generator to complete the questionnaire. All questionnaires were sent from XY's marketing email.

Since the researcher intended to question the XY's clients, a XY' staff member was required to help facilitate in sending the questionnaires to the clients (Lavrakas, 2008). The restriction on the number of respondents is to follow the business' normal practice when distributing their own surveys. The online questionnaires were created and sent to participants by email using the marketing management system tool, m-savvy.

Interview

To corroborate and triangulate the results from the questionnaire, a semi-structured interview approach was employed. The interview questions used were formed by the researcher with the aim to reflect the themes found in the literature reviewed. The interview questions were of an open-ended design to gain in-depth information on the topic. Each of the respondents were presented with an information sheet, via email, and a consent form, before the interview, regarding their participation. Respondents were assured of their anonymity and notified that by participating they would be agreeing to the information being used for research purposes. The researcher then made appointments with each of the managers using the Microsoft Outlook calendar.

Interviews were conducted with eight XY managers. These managers are responsible for communicating with the clients. Prompting questions were also used to encourage the interviewees to expand on their responses. Each interview took between 10 and 20 minutes to complete. The researcher asked the questions, took handwritten notes and transcribed the interview. A voice recording device was used to record the interviews so the researcher could review the responses and transcribe responses with more details.

Limitations of research methods

Limitations can affect the reliability and credibility of the results collected for the research. One overall limitation of the research was time, given the deadlines for this piece of applied research. This meant that the questions used in the questionnaire and interviews may not have been adequately piloted, and thus refined, in a way to gain the best responses.

The sample size was limited to 130 clients, as the organisation usually sends out 130 surveys at any one time. A larger response rate could increase the validity of the results. The population size was further restricted as clients that had completed a Net Promoter Score (NPS) survey conducted by XY', at a similar time to the research being undertaken, were not included. NPS is used to assess customer experience using scales from 0 to 10 (Nice Satmetrix, 2017). Self-selection bias was introduced into the research, as the respondents had the choice of whether or not they wanted to respond to the questionnaire (Wright, 2005).

The quality of responses, can be influenced by the relationship between the interviewee and the interviewer, for example, some of the interviewees can feel uncomfortable with expressing some of their opinions to the researcher (Kumar, 2011). The limitation of time may have also affected the quality of responses as these interviews were conducted during the work hours of the interviewees.

Interviewer bias is another limitation that may affect the conveyance and the interpretation of the interviewees' responses.

RESULTS

The aim of this research was to answer this research question 'How do current engagement levels influence client retention at XY?' In particular, what communication methods are being used by XY to engage clients, how satisfied are clients with the amount of engagement occurring between the two parties and, what relationship exists between the amount of engagement and client retention?

Questionnaire Results

As described above, a questionnaire was used to analyse the views of XY' clients regarding engagement level, communication methods and re-engagement of XY' services. In this study, questionnaires were sent to 130 clients electronically. A total of 61 clients completed this survey, giving a response rate of 47%. Data analysis only used the 42 clients (32%) who responded to all questions apart from question thirteen as it was an open-ended question. The data were collated into numerical codes to conduct statistical analyses.

As illustrated in Figure 1. 36% (n=15) of the respondents had used XY services for fifteen plus years. 7% (n=3) had used their services for eleven to fifteen years. Additionally, 26% (n=11) had used it for six to ten years while 31% (n=13) have been XY clients for less than five years.
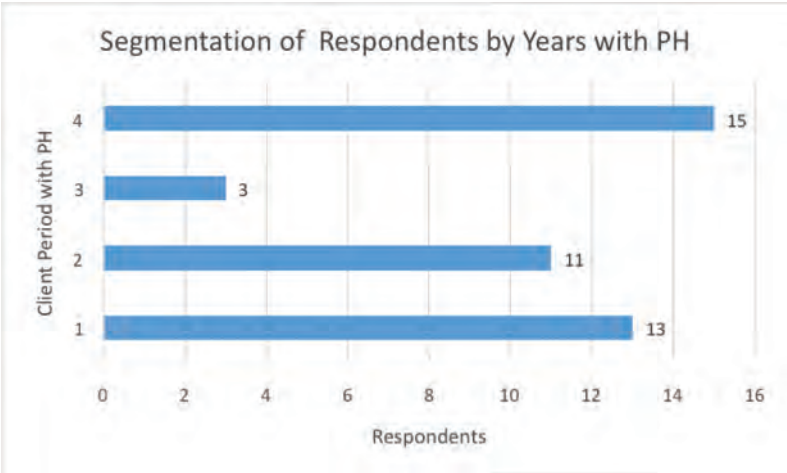
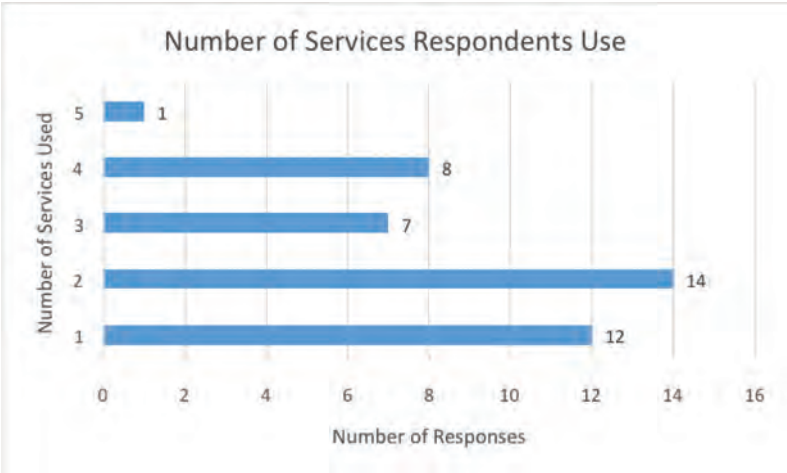Figure 1. Respondents' years using XY services.

Figure 2. Number of services used by respondents.

While some clients in this sample used as many as 4 or 5 services from XY, over half of the client-sample use either one or two XY services. When breaking the data into segments, clients who had used XY for 0-10 years were using an average of around two services, while clients who had used them for 11 to 15 plus years used an average of three services.

Not important	Slightly Important	Moderately important	Important	Very Important
5	9	12	11	5

Frequency of responses:

On average, replies indicated that communication frequency was moderately important when using the services (SD =1.21). 29% of the respondents reported that the frequency of communication was moderately important. Interestingly, it was found that 12% of the respondents did not find it important. This result was equal to the number of respondents that did find it very important. Respondents that had used XY' services for 0 to 10 years, found that the frequency of communication was only slightly important. In contrast, 11 to 15 plus years respondents found communication to be moderately important.

	XY to Client	Client to XY
Face-to-Face	Once a year	Once a year
Phone call	Once a year	Once a quarter
Email	Twice a month	Once a quarter
Mailed letter	Once a year	Never
Text message	Never	Never
Video call	Never	Never

Table 1. Comparison of the average frequency of contact between XY and clients in a year.

Two questions were used to find out how often the business and the clients contacted each other in one year. These results are shown in Table 1. The frequency of contact via face to face between the two parties was once a year. Clients tended to use the phone to contact XY more regularly, whereas it was found that XY would frequently contact the client, via email, twice a month compared to the client's once a quarter. XY sent mailed letters more than the client. The data also shows that both parties rarely used text messages or video calls.

More than half of the respondents (52%) found that communication did not improve the quality of services provided by XY. Three respondents (7%) found that communication improved the quality of service by a lot. When breaking it into segment by years with XY, 6 to 15 plus years, communication improved the quality of services by a little, whereas 0 to 5-year clients found that communication did not improve the service at all.

It was found that 48% of the respondents preferred using email. This was followed by phone calls, then face to face meetings, while 86% of the clients' least preferred method of contact was video calls. When breaking it into segments all respondents preferred communication through email. Additionally, 0 to 5-year respondents preferred face to face contact over a phone call.

Quality of communication: On a scale of one to five, 48% of the respondents found that the quality of communication was 'very understandable'. The remaining 52% found it to be between 'somewhat understandable' and 'understandable'.

Frequency of communication: More than half (67%) of the respondents found that the frequency was 'just enough'. There were 21% of respondents who found that the frequency was 'more than enough' and 5% found it 'too much'.

Service standards: 52% of the respondents found that the service standards were of a high quality, 33% responded that the service was of a good standard and 12% found it to be of acceptable quality, while 64% of the respondents found that XY had met their expectations. There were equal numbers of respondents who found their expectations were somewhat met and those who reported that their expectations had been greatly exceeded. It was found that 25 (60%) respondents said they would reuse the services. This is in comparison to one client who would definitely not reuse the services.

Interview Findings

To achieve the aims of the study as mentioned above and triangulate the survey results, this study conducted interviews with eight managers at XY. The intent of these interviews was to explore the respondents opinions on client engagement and its relation to client retention. To answer the research questions, managers were questioned on factors that drove customer retention.

All eight interviewees answered all the questions the researcher had posed. The data was collected to gain the opinions of what client engagement is and its effects on client retention.

Client Engagement

When the managers were asked what it meant to engage with clients, almost all replied with "communication". To them it meant getting to know the clients in a formal and informal manner. *"It's about having a normal conversation with them not just business…"* (Int D). The interviewees stated that by communicating, they were able to understand the clients' needs and deliver on what was communicated. This meant they were able to show *"genuine interest"* which allowed them to *"personalise"* their service. They also stated that engagement meant "having that relationship with the client" (Int E). This relationship, as stated by some of the managers, meant that the clients or the managers could *"feel free"* to ring or email each other when problems occurred. To Interviewee G, engagement meant they had to make the client feel *"comfortable"* enough to disclose their situation or information. This showed the managers that the clients trusted them to do the right thing.

Almost all the interviewees wanted to engage more with some of their clients. Interviewee C stated that they had enough engagement with their clients. Some interviewees stated that judgements had to be made on how much engagement the clients wanted, *"Everyone's different"* (Int D). Interviewee E found it hard to engage with all their clients due to the limitation of time. Interviewee E referred to the *"80/20 principle"* to identify who required more engagement. Some interviewees stated that the engagement depended on if it would add value to the client.

Communication Method

Communication, as mentioned earlier, was important for the engagement of clients. The interviewees observed that by conversing with the clients they were able to learn more about the individual, helping to understand their needs. When interviewees were asked about the preference of communication method, emails, phone calls, and face to face meetings were highlighted as preferred methods. For some interviewees they found that when they wrote emails, it gave them and the client time to consider what was in writing. Most managers would then *"follow up with them [client] by phone call"* (Int B). One interviewee stated that they did not like using emails as they thought it was impersonal. Interviewee D found phone calls to be *"convenient...on the phone it's all done and dusted within a few minutes"*. Face to face meetings were acknowledged by interviewees as the best method to use when communicating with clients, but as they stated it was *"not always practical"* for them or for the client (Int G). Interviewee D stated that face to face communication was *"easier [as] you can read their body language"* which let the manager know if the client understood. The interviewees stated that the communication methods used were based on the situation. It depended on if it was *"of value"*, *"worth"* and *"of importance"*. Really important conversations were conducted face to face and less important ones were achieved by phone or email. *"Talking on the phone is always about finding out what's going on"* (Int G).

Customer Relationship

The word *'relationship'* appeared 32 times in total from all the interviews, indicating how important this factor was to all of them. The interviewees mentioned that client relationships were formed through communication. Some interviewees built their relationship through monthly contact, resulting in the client referring colleagues to use the same services. *"A good relationship I think like [Name]". They recommended us to these other ones and now they've come on board."* (Int B). Interviewee E said, *"The key to building the relationship is to have as many interactions as possible and*

as regular[ly] as possible … I think any relationship that's strong [means] the chances of somebody actually breaking down that relationship is so much slimmer."* It was identified by Interviewee E that a stronger relationship also meant that the client had more confidence in the manager. Relationships would "fail if communication was inadequate" (Int G).

Client Retention

Six out of eight interviewees stated that having relationships with clients was a driving factor of client engagement. When interviewees were questioned if they thought the engagement levels affected the retention of clients, there were some that said *"definitely"* yes. Factors that interviewees thought may be driving customer retention can be found in Table 2.

Interviewee A	Interviewee B	Interviewee C	Interviewee D
Relationship	Good relationships	Tends to be what drives communication, and attention	Knowing the clients
Good service	Monthly contact	Service quality	Communicating and responding
Positive client	More than one point of contact	Relationship	Available
Perception of getting value			Responding in timely manner
Interviewee E	**Interviewee F**	**Interviewee G**	**Interviewee H**
Good client service	Relationship	Quality advice	Contact
Strong relationship	Perception of reliability	Quality service	Good service
Delivering on what was communicated	Trustworthy	Responsive	Valued service
	Quality of advice	Available	Make them feel valued
	Being available	Timeliness	
		Be less generic	

Table 2. Factors that drive customer retention.

Some interviewees felt the level of engagement depended on the client. Some did not *"necessarily want to engage with you"*. But it was identified by Interviewee F that this, *"doesn't mean that we [the managers] shouldn't"*. Some of the interviewees noticed that *"cost-based clients"* were worried about the potential costs associated with contacting XY. Interviewee A pointed out the managers should be clearer about costs that could be charged.

Other factors affecting the retention of clients include the provision of good advice and service quality. The managers provided these by *"having a good team"*, *"being available"* and *"responsive"* to calls and reducing turn-around times for client's work. XY managers also try to improve service quality by personalising and making a service less *"generic"* for the clients through listening, *"considering and thinking about what you're doing"* Interview G also said clarity is key, *"we as a firm are not the cheapest. We therefore must be on quality. If we're not delivering on quality then [clients will] go somewhere cheaper."*

DISCUSSION

The aim of this research was to explore how the current client engagement levels may influence the client retention at XY. To achieve this aim, results were gathered through a questionnaire targeting XY clients and interviews with its managers. The following sections link the results and findings of this research in light of existing literature. These are: client engagement, communication methods, client relationship management and client retention.

Client Engagement

The definition of client engagement is the use of communication to involve clients in a business forming a relationship that is mutually beneficial for both parties. In the findings, client engagement was about the communication, whether it be in an informal manner or a formal one. It was found that communication helped XY to better understand their clients, thus tailoring the services for each individual. Merkl-Davies and Brennan (2017) stated that in accounting, users of the financial statements had different skills and expertise, so it was important to be able to communicate with a range of clients.

It was reported that 67% of the respondents had experienced an adequate amount of communication with XY. Interestingly, the staff at XY stated that they wanted to increase how much they engaged with their clients. They expressed that this engagement depended on each client and whether or not the interaction would add value to the individuals. The research found that the frequency and how well communication was understood aided the quality of service provided by the business. The results in the survey showed that clients with not enough contact, thought more communication could improve the quality of service they received. Clients who had an adequate amount of communication thought that more contact would not improve the quality of services. This relationship can be shown in Figure 3. This difference could be due to the belief that more frequent communication could lead to communication clarity, which would in turn improve the quality of the service received. This statement is thought to be true as the increased communication helps the service provider with gaining clearer information, therefore better tailoring of services, and improving of the overall quality of the service (Dabholkar, 2015). Dadfar, Vrege, and Sedigheh (2013) found that clients appreciated the transfer of professional advice because they are not fully knowledgeable and are in need of getting assistance from the service provider to perform well.
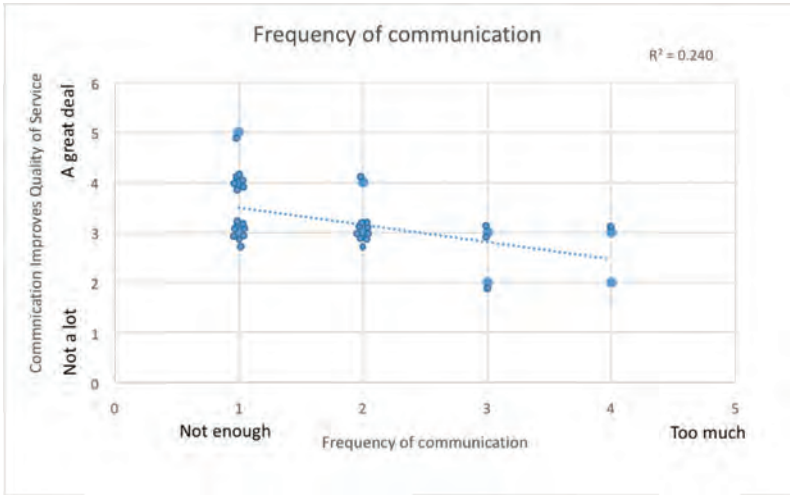

Figure 3. Frequency of communication and its relationship to the Improving the quality of service.

The research showed that the amount of communication was dependent on the individual client and the manager. This result was supported by Schertzer, Schertzer, and Dwyer's (2013, p. 612) research. They also found that *"performance of professional services was highly dependent on the interactions between service provider and client"*. The findings of the current research found that costs were a factor that had an influence on the amount of engagement clients wanted. As mentioned in the literature review, clients would look at the fairness of price when choosing services (Kaura, et al., 2015). Participants stated that the clarity of costs were required. The uncertainty of the costs could put off a client wanting to engage more with the business.

Communication Method

Clients and managers preferred engaging through the use of emails. Shrivastava (2012) stated that communicating through emails was becoming popular as it was efficient. Results showed that currently, both the client and XY staff contacted each other through email more frequently than any other method of communication. Some respondents in the interviews conveyed that they preferred emails, as it gave them time to consider the message when preparing it. It was also expressed that it was impersonal and inappropriate for some situations. Phone calls were the next preferred method of contact by clients and managers. This method of contact was found to be convenient, it allowed immediate feedback, so it was quicker to communicate the message to the other party. Communication through face to face meetings were preferred after phone calls, as seen in the findings of this research. It was interesting that when clients who had used XY for five years and less preferred face to face meetings and the older clients preferred phone contact. This result may be due to newer clients wanting to build a relationship with the manager. Managers stated they knew face to face was the best method in practice but stated that it was not always practical for the client or themselves. Staff found methods of contact also depended on how valuable the information would be for the client. Text messages and video calls were the least preferred method of communication for the clients. This was an interesting finding as the use of text messages were thought to be an increasingly widespread communication method as stated by Karasz, Eiden, and Bogan (2013).

Client Relationship Management

As mentioned in the introduction, clients are important for all businesses to continue into the foreseeable future. Relationships were a key theme in the interviews, illustrating how important these are for retention of clients. It was expressed in an interview that without communication there would be no relationship. Managers stated, through having regular client contact, they were able to gain more clients for the business. Regular communication was the foundation for building stronger relationships, making it harder for clients to defect from the business, while also promoting word-of-mouth to gain new clients. The communication process allowed the staff at PH to form relationships with their clients which also resulted in trust in the staff (Hannan, et al., 2017). The managers believed the clients were more comfortable to contact the team if required. Garaniti, Pearce, and Stanton's (2011) research supports this finding as they found that communication deepens relationships, also encouraging self-disclosure.

Client Retention

In the literature review it was mentioned that clients that were retained were loyal to the business. This loyalty was achieved from their experience with the businesses' services (Stan et al., 2013). The results showed that a third of the respondents had been loyal to XY, using the services provided for fifteen plus years. This result shows that the business is providing a good experience for these clients. As Jones' (2010) study mentioned, the engagement between the two parties does not always mean the client remains loyal. It was found that clients that had used the services of XY for longer were using more services than those who hadn't. This result shows the loyalty of the clients (Roberts, et. Al., 2010).

The results of this study did not find any strong relationships between the methods of contact and client retention. The results also did not show any particularly strong relationship about the amount of engagement and client retention. Rather, it was there was a weak positive correlation between the two factors. This suggests that the

frequency of engagement does not directly affect the retention of clients. Instead it was found that the experience of service standard and meeting the expectations of the clients had slightly more influence on the retention of clients. As mentioned above the frequency of communication was dependent on the individual clients. The frequency of communication was only moderately important to the client when using XY' services. Instead, the results show there are other factors that are important to the clients when deciding to re-engage in a business.

There were a range of factors found in the questionnaire and interviews that may also have an effect on the retention of clients.

Quality of service – The results found that the quality of communication had an effect on the perceived service quality. The service quality showed a stronger correlation between likelihood of reusing services compared to the frequency of communication. When some interviewees were questioned on the meaning of services quality some responded stating it was about returning calls promptly, being *"available"* and *"attentive"*. To the managers, service quality also means completing services in a timely manner.

Adding value – A few of the managers expressed that clients would leave XY if they do not see value being added to their business. It was stated that clients needed to *feel* valued. Trasorras, Weinstein, and Abratt's (2009) research, indicated that value is perceived differently among clients, further explaining that businesses had to have a unique strategy to drive value.

LIMITATIONS

This research was restricted due to the lack of previous research conducted on the amount of engagement a business should have with their clients, especially in the field of accounting. This also had an impact on the design and quality of data collection techniques and analysis measures.

A major limitation of this research is having social desirability response bias. This is stated to be where the questionnaire and interview prompt respondents to have an inclination of presenting themselves in a favourable image (Van de Mortel, 2008). This can affect the validity of the findings as it can skew the data, possibly confounding or hiding the relationships between variables.

A limitation of this research was the timeframe. The limited time prevented in-depth analysis of the data collected, affecting the quality of the findings. Due to the limited time questionnaires and interviews were conducted at the same time. This resulted in missing the important factor of relationships in the questionnaire which was found from the interviews. This may have given the organisation a better insight on their clients.

This research was a small-scale study, this poses a threat to validity and also means that the findings may not be appropriate to be generalised to the whole population (Hackshaw, 2008). Increasing the sample size of respondents for the questionnaire would increase the validity of the findings. Having the time pressure also meant that survey responses were collected over a short period decreasing the response rate.

CONCLUSION

This research project focused on XY, a business advisory firm based in New Zealand. The project was aimed at answering the question 'How do the current engagement levels influence client retention at XY?' In particular, what communication methods are being used by XY to engage their clients, how satisfied the clients are with the amount

of engagement and, whether there is a relationship between the amount of engagement and client retention.

Two research methods were used to gain a more in-depth understanding of the research problem. Online questionnaires were distributed to clients using XY services. Interviews were conducted with eight managers in the executive and accounting solutions team at XY. These research methods were conducted simultaneously using a mixed research method. The discussion was based around four key areas, which were consistent with the literature review and supported by academic literature.

In conclusion, there was only a moderate, and arguably vague, relationship found between the current engagement levels and retention of clients. Instead clients appeared to have an adequate amount of communication. In terms of communication methods, XY used emails, phone calls, face-to-face meetings and mailed letters to engage clients. There was also no relationship found between the amount of engagement and client retention as it was dependent of the individual clients and other factors.

In summary, this research produced some interesting results, followed by a number of specific recommendations for XY and future basis in relation to research.

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INTERNET OF THINGS AS A BUSINESS STRATEGY

Neville Auton

INTERNET OF THINGS A BUSINESS STRATEGY

LoRa Network Topography

The development of a Long Distance Radio (LoRa) network based Internet of Things (IoT) system from idea to initial pilot deployment is presented in a case study from Otago Polytechnic based around internal space environment data collection. It was found that utilisation of state of the art new components such as LoRaWAN industrial gateways and student manufactured sensing nodes can be very beneficial for short pilot studies.

LoRa is a patented wireless data communication technology developed by Cycleo of Grenoble, France (Prashant, 2018). LoRa technology works at long distances, consumes very little power, and is strong enough to penetrate walls. This makes it an ideal solution for situations in which sensors need to send small amounts of data multiple times each day. An expected 50 billion sensing devices are expected to be in place by 2025 (Wood, 2018). Both Vodafone (Vodafone, 2019) and Spark NZ (Spark, 2018) are deploying LoRa networks to help meet the bandwidth needs of connected devices.
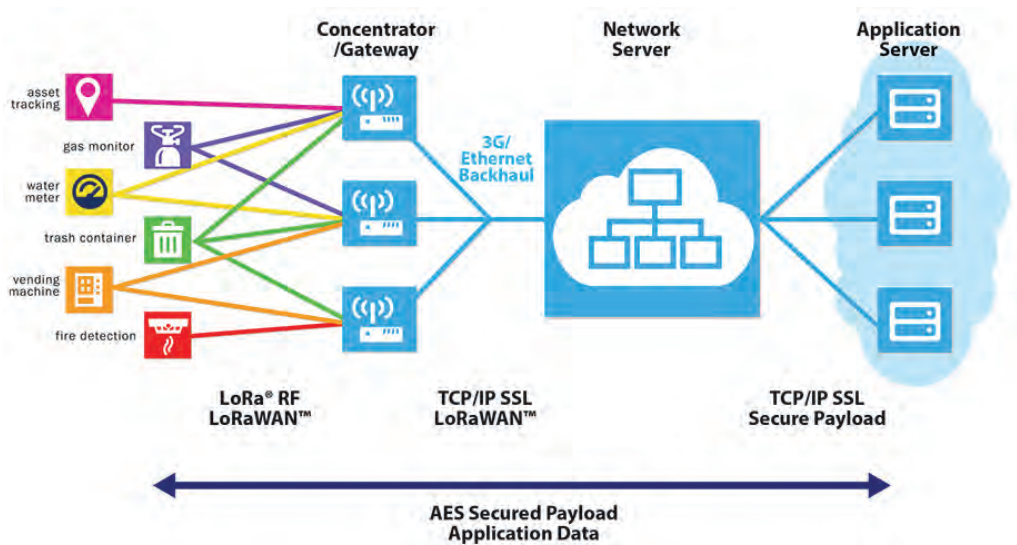

Figure 1. LoRa Topography (www.researchgate.net)

The IoT devices will soon affect every business as they offer them unprecedented opportunities for process automation and mass data collection. These IoT devices will allow businesses to develop a new range of services around their existing products and the ability to enhance service offerings.

Consumers will place pressure on business to have additional service or product deliverables that include IoT. Smart kitchen appliances are entering the market providing consumers with added value. Smart refrigerators that will create grocery lists linked to a local supermarket with free courier delivery are an example. These features would have seemed pointless ten years ago. In the future, though, it will probably be a standard feature of all refrigerators.

The increase in data collection from IoT devices will allow detailed tracking of consumer product use behaviour. Increased data will allow technology to make product recommendations to consumers based on individual consumer preferences. As IoT penetrates all aspects of business, the increase in data will change the way we target advertising and drive future smart product development.

The low cost of IoT technology will see both stand alone and embedded devices increase in availability. Thus IoT smart technology will transform business, providing more intelligent data and automation, and importantly, it will change consumer expectations. Embedded technology will become an integral part of the product. Businesses that invest in IoT technology and custom applications will be able to keep pace with consumer expectations of technology capability (Sniderman, Gorman, & Hodowslky, 2016).

IoT will change the way that consumers buy products with a buying cycle that is likely to become shorter. Consumers will expect a faster, more convenient service and the increasing need for instant gratification will place new demands on businesses. Businesses will need to employ smart technology so that they can keep up with consumer demands (Koesters, 2018).

IoT embedded devices will allow businesses to actively monitor home appliances or business assets thereby notifying customer services when repair or replacement is required. IoT reporting of fault codes for example, will allow service staff to acquire correct parts to execute a repair. IoT vibration sensors will advise equipment supplies when a critical component in a compressor requires replacement. This responsiveness in turn, generates improved customer service and provides new marketing opportunities (Ramaswamy, 2016).

The tracing of inventory and assets is a major business headache. The use of IoT has allowed tracking of both large and very small assets anywhere on the globe. IoT asset tagging can reduce the need for manual tasks like inventory checks, thereby freeing up staff for other duties. Weighing sensors will enable for example, small part count, fluid content levels linked with location, and storage environment temperature monitoring. Additionally IoT tracking has the ability to reduce the theft of inventory and assets, as well as to increase productivity across a range of corporations, small business, environmental and conservation organisations.

Understandably IoT systems are transforming business efficiency and productivity, improving customer insights and customer experience, asset tracking and waste reduction. For example:

- Agricultural production, soil sensors determine irrigation needs

- Smart livestock tags help manage large herds

- Electricity metering

- Street lighting control systems with automated reporting of faulty lights

- Parking meters and parking space use

- Garbage containers will analyse and communicate fill levels

- Person trackers

- Object location

- Beer smart kegs monitor fill level

- Environmental monitoring

- Endangered black rhino tracking (or any endangered species).

OTAGO POLYTECHNIC LoRa ENERGY PROJECT

The installation of a LoRa gateway at Otago Polytechnic has enabled students to research and develop LoRa sensor technology to monitor temperature and humidity. These sensors transmit data every five minutes from eight room sensors located across a floor that has wired sensors only in corridor spaces. (See Fig 2). In addition to sensor manufacture, students have created a web-based interface that allows viewing of room data on a floor plan and individual sensor temperature trending as shown below. (See Fig 3).
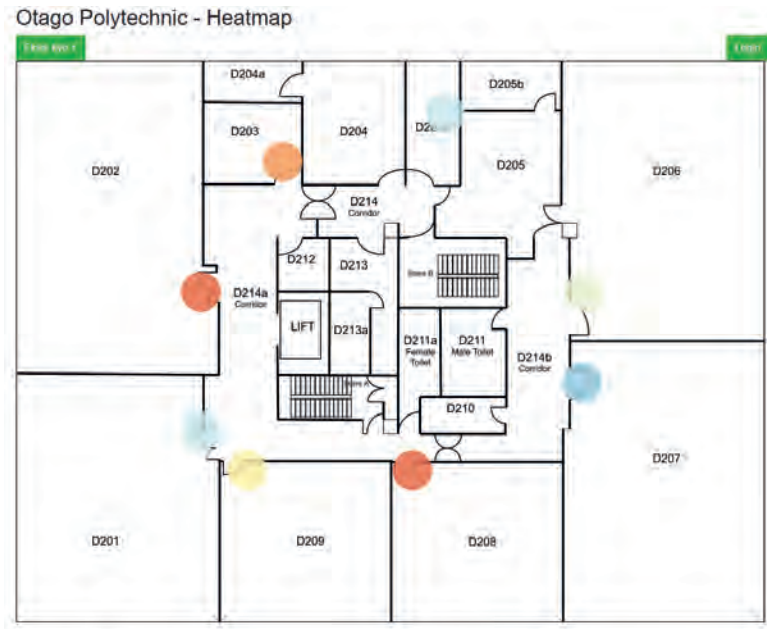

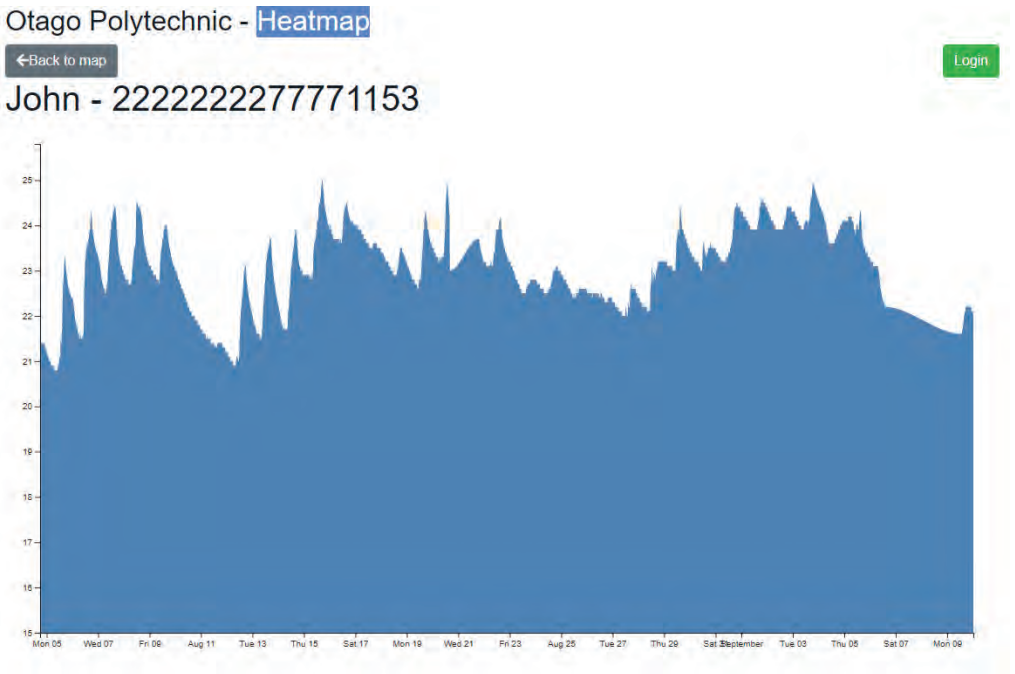Figure 2. Floor plan with sensor locations

Figure 3. Temperature trending of sensor

The next generation of sensors are being enhanced to allow monitoring of temperature, humidity, CO2, light level and occupancy. With mass installation of sensors in hundreds of spaces across the campus, a full understanding of the internal environment will be gained. Space heat up and cool down timing will allow optimisation of the boiler hot water supply to the heating network. CO2 levels will determine if the quantity of fresh air delivery from ventilation systems is sufficient for the occupancy rate of each space. Light level sensors combined with occupancy sensors will provide insight into level of spaces having lighting left on with no occupancy. Occupancy sensor data will provide an understanding of space utilisation, informing capital investment related to the need for additional space needs.

Practically, LoRa offers many opportunities for student-based projects such as:

- Fleet vehicle trip distance, tracking and location

- Electricity, water and LPG metering

- Irrigation requirements for lawns and gardens

- Bird life count throughout campus

- Parking space availability

- Vending machine use

- Freezer/ fridge temperature monitoring

- Rubbish bin fill levels

Although it is still at a relatively early stage, LoRa Wide Area Networks (LoRaWAN) have already found widespread acceptance among telecom companies and smart service providers across the globe. Both Vodafone and Spark in New Zealand have established networks (Spark, 2019). Capability that will allow LoRa devices to connect via secure narrow band data transfer on the cellular networks Over the next five years or so, countries including the not-so-advanced nations will embrace LoRa technology due to its low cost advantages. One prediction is forecasting billions and billions of connected IoT devices in operation by 2025. "Ultimately, the exact number is less relevant than the broader notion that IoT adoption is ever increasing and that the connected technology is beginning to blur the boundaries between the physical and digital worlds" (Wood, 2018, p. 1).

Increasingly, IoT will change how business leaders, designers and manufacturers think about topics such as research and development, marketing and security. Bespoke products are replacing desire for mass produced goods; it is a serious design challenge releasing products into a marketplace where customer expectations are continually evolving. Companies already process knowledge and can use IoT to enhance previous offerings of service and information delivery.

One of the benefits of using IoT is that it challenges organisations to think beyond the physical object and adapt to manufacturing processes to keep up with change. Businesses will utilise IoT data, thus providing insights to differentiate themselves, monitor real-time developments and drive future-thinking decisions. Businesses will be able to determine if an IoT solution can address a specific issue that is halting growth and how the solution will benefit their customers over time.

IoT industrial sensors can improve manufacturing processes effectively having an end to end process captured by data streams from low cost sensors. Furthermore, IoT will guide product design if organisations want to meet the challenge of digital disruption, and this will in turn require IoT enabled manufacturing. Data analysis for example can highlight manufacturing bottlenecks and assist to improve daily productivity. Analytics and data capture technologies will provide a move towards predictive maintenance of products and equipment (Marr, 2017).

A mass of interconnected devices and the data generated will require a well-documented IoT strategic plan that provides financial gain to the bottom line. A prospective solution's functional requirements and the business core competencies will need to be aligned within a strategy. In the global data driven competitive market a comprehensive strategy will determine if an organisation is a winner or loser.

When implementing IoT applications to enhance products, it is critical that organisations communicate clearly the need to build in security before deployment of solutions. Every device connecting to a business network creates risk (Maddox, 2016). Business leaders want to be first to market and reduce costs, but data security is just as important. Encrypting communications and values of IoT data streams will provide a reduction in this risk.

The proliferation of IoT technology in the future is likely to increase the number of people working from home. Many functions will be able to be carried out by home-based workers. Access to multiple IoT devices in the field and within manufacturing plants will allow the development of tasks to be completed remotely. Remote workers are seen as more efficient and cost effective (Alton, 2017). Future business success will be based on developing a talent pool capable of addressing not only IoT but application design and big data analytics. It will be critical that cross-functional collaboration is encouraged between designers and engineers.

In summary, IoT brings about automatic communication of data that makes way for automatic measurement and analysis of data. Business decisions will be more accurate and therefore successful, as they will be supported by real time and trending data. Also, IoT transformation creates a fantastic opportunity for business to completely rethink products, services, and development from the ground up. The world has changed. Technological advances is credited for much of this change. The innovation of IoT offers strategies for sustained competitive advantages in a world that is becoming 'smarter' every day.

Neville Auton works at Otago Polytechnic as Energy Manager implementing energy management improvement through the development of smart devices. Neville's technical background in electronics and energy management informs innovative electronic solutions to solve energy related technical and analytical challenges, including the development of prototype low cost electricity meters, heat meters deployed across Otago Polytechnic's building infrastructure and student research.

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CHANGING NEEDS OF CHINESE VISITOR SELECTION OF ACCOMMODATION IN NEW ZEALAND

Rachel Byars

INTRODUCTION

The accommodation industry in New Zealand is a diverse industry with a range of accommodation provisions available to guests; choice varies from small owner-operated establishments to exclusive lodges to multinational chain hotels. This broad range of accommodation provides potential guests with a dilemma when choosing accommodation especially if they are unfamiliar with the classifications. Accommodation managers are also faced with the ever-changing use of resources to attract and retain guests. Chinese tourists, the largest and fastest growing outbound tourist market, have received considerable attention from the World Tourism Organisation (UNWTO, 2013). Chinese tourist growth in visitor arrivals to New Zealand continues to be strong; despite a drop in early 2019, the market is expected to grow strongly during the forecast period of 2018 to 2024 (Ministry of Business, 2018).

The Chinese inbound tourist market for New Zealand accounts for 8 per cent of total visitor spending and continues to grow strongly due to the emerging middle class and industrialisation of China (Tourism New Zealand, 2014). Notably there are positive shifts towards ensuring quality products are sold within China; despite the 4.3 per cent decrease in Chinese shopping tours during the period of January to May 2014. New Zealand has experienced a 63.3 per cent increase in Chinese independent holiday tourists during this same period (Statistics New Zealand, 2014). Since the China Travel Law was introduced in October 2013, there has been an 18 per cent increase in the length of stay of Chinese Visitors in New Zealand; up one day from 6.5 to 7.5 days (Statistics New Zealand, 2014). Solid increases in general visitor visas have also been noted. The change in the China Travel Law has also caused a higher ratio of younger Chinese holiday tourists to visit New Zealand. The shopping tour market usually consisted of an older than average profile, so the shift in age may reflect the decrease in shopping tours or the relative ease of travel for younger people (Statistics New Zealand, 2014).

As the economy in China continues to thrive, with the increase in disposable income, more public holidays and an expanding middle class, the growth of the outbound Chinese visitor market continues. Many of these visitors have traveled within China, but often to a lesser extent abroad. The United Nations World Tourism Organisation (UNWTO) and the China Outbound Tourism Research Institute (COTRI) estimate that by 2020 there will be 100 million outbound Chinese tourists making it the largest tourism market in the world (Liu, Lin, Zhou, & Chandnani, 2013). Not only is the middle class Chinese segment growing, Liu et al., (2013) also state that China boasts the biggest number of "self-made millionaires and billionaires in the world" (p.7). The Hurun Report (as cited in Liu et al., 2013) showed that the number of billionaires in China had increased by 30 per cent in one year 2010 to 2011.

A plethora of studies have been conducted to examine the underlying motivations, expectations and behavioural patterns of Chinese tourists in the context of different products and destinations. Some studies have realised different behaviours and traits exhibited by Chinese tourists and attributed differences to the cultural factors (Li, Lai, Harrill, Kline, & Wang, 2011; Sparks, 2009). Further studies have used focus groups of Chinese tourists to investigate if their desires and requirements were met throughout their international travel experience (Li et al., 2011; Tsai,

Yeung, & Yim, 2011; Yoo, McKercher, & Mena, 2004). These studies found changing expectations of authenticity, high quality service, respect and an understanding of cultural requirements were important (Li et al., 2011). There have also been previous studies on the factors used in the selection of accommodation by guests (Callan & Bowman, 2000; Lockyer, 2005; Lockyer & Roberts, 2009; Poon & Low, 2005) however, there has been little research into the choice of accommodation in New Zealand by Chinese visitors. With continued growth of Chinese visitors, it is necessary for New Zealand accommodation providers to gain a better understanding of Chinese visitors in terms of accommodation preferences and criteria. The results of this study will help New Zealand accommodation operators to consider better facilities and services to Chinese visitors, as well as effective strategies to ensure increased Chinese visitors through positive visitor experiences.

LITERATURE REVIEW

Perceptions of accommodation provision

Factors influencing guests' selection of accommodation can be complex (Lockyer, 2005). The stages of accommodation selection can be considered in the context of consumer behaviour where need recognition, pre purchase search, and evaluation of alternatives, purchase and post purchase evaluation are all important stages (Schiffman & Kanuk, 2007). Wang, Vela and Tyler (2008) researched the role of Chinese culture in influencing their expectations and perceptions of the hotel service quality in the United Kingdom. They found that cultural backgrounds could influence a tourist's perception of hotel quality depending on attributes such as décor, operating environment and staff service. Wang et al., (2008) stated that due to rapid modernisation taking place in China along with increasing disposable income, the Chinese market is increasingly expecting hotels to have large, modern lobbies, guest rooms and facilities. Due to this increase in expectations, Chinese tourists can often be disappointed when visiting overseas hotels to find small lobbies, which lack a sense of arrival, and small cramped guest rooms.

Cultural differences are reflected in a number of ways, such as communication, rules of social behaviour and service (Reisinger & Turner, 2003). These cultural differences could influence attitudes of travel characteristics such as trip duration, travel mode, expenditures, length of stay and accommodation preferences (Yoo, McKercher & Mena, 2004). These characteristics may not only be influenced by cultural differences but also by geographical distance which was evident in a study by Gilbert and Tsao (2000) who found that Chinese customers were more price-sensitive than Western customers. Chinese buyers were more concerned with the price than with the quality of a product, whereas Western customers cared more about the quality than the price of a product. This finding appears to contradict the view that Chinese markets are seeking larger, more modern hotels and facilities, which may cost more.

Accommodation selection considerations

There has been interest in the differing needs and wants of both business and leisure travellers alike when selecting hotel accommodation. For many, business travellers may be viewed as filling a gap on weekdays, whereas for others this travel may be their core business. Knutson (1988) reported that business travellers considered the following important factors when selecting a hotel: clean, comfortable, well maintained rooms, convenient location, prompt and courteous service, safe and secure environment and friendly and courteous employees. Furthermore, business travellers in the economy segment were more price sensitive to rates than were mid-range or luxury travellers. Further to this study, Lockyer (2005) found a relationship between price and location, where if a traveller wanted to stay in a particular location, they were more likely to pay more for their accommodation. He also found that location was a determining factor in business travellers' hotel selection decisions. However, price was a less important consideration in their selection, as often accommodation was selected and paid for by their companies.

Lockyer (2002, 2005) also found that the cleanliness of the room or hotel was ranked by potential business guests as the most valued hotel attribute, followed by bathroom and shower quality, and quality of staff service. A study by Cobanoglu, Corbaci, Moreo and Ekinci (2003) revealed that there were significant differences between male and female travellers in the perceived importance of security, food and beverage, complimentary goods, parking and health sensitivity when selecting accommodation, in particular a hotel. Lockyer (2002) also found that safety and security of a hotel or motel was important to most female business travellers, whereas, there was no distinction between male and female visitors in the study by Tsai, Yeung and Yim (2011).

Although leisure travellers may have some differing needs from their business counterparts, they do share common preferences in hotel selection, such as clean, comfortable, well-maintained rooms, convenient location, prompt service, safe and secure environment and friendly and courteous employees. Knutson (1988) found that they were more concerned about rates and the availability of recreational facilities. Callan and Brown (2000) found in their study that leisure travellers placed a greater emphasis on staff attitude and behaviour and on the value that they received for the price paid. This concurs with Yesawich (2006) who reported that value for the price paid was one of the most influential factors for hotel selection among leisure travellers. Lockyer (2005) also agreed that travellers looked more carefully at the value received for the price paid when staying for leisure purposes. Although this study was not necessarily designed to examine the purpose of their visit, the review of these studies offers greater insight.

Importance of relationships and the concept of 'guanxi'

Chinese people attach great importance to establishing long term-relationships and although this is difficult when travelling, the personal connection practice known as 'guanxi' is a major characteristic of their culture and relationship marketing in China (Wang, Vela, Tyler, 2007; Gilbert, & Tsao, 2000). Guanxi can be likened to manaakitanga, which is loosely translated as 'hospitality'. More specifically, relational connections are based on reciprocity, mutual obligation and trust. Wang, Vela and Tyler (2007) noted that "Chinese tourists coming from a high-context society attach great importance to such ritualistic behaviour such as smiling, greetings and handshaking" (p. 320).

METHODS

The study employed a mixed methods approach (Denzin & Lincoln, 2005) to analyse the factors that influence selection of accommodation by Chinese visitors to New Zealand. The study included a survey and the findings of four in-depth interviews conducted with three accommodation operators (one in Dunedin and two in Queenstown) and a member of the regional tourism organisation. This approach is in line with the constructivist research paradigm which supports a more tentative, inductive and interpretive form of data collection and analysis (Wells, Hirshberg, Lipton & Oakes, 2000).

The survey drew a total of 100 responses from Chinese visitors. Respondents were asked a range of 23 close-ended and open-ended questions, which examined where these visitors were from, their length of stay, the purpose of their visit to New Zealand, their method of travel in New Zealand, type of accommodation preference and rating, preferred attributes of accommodation, and how New Zealand accommodation providers could improve their accommodation. To avoid ambiguity in the questions and to ensure that all of the questions written on the survey were clearly understood by the participants, a Chinese speaking national administered the survey which helped with any language barriers. The data collection was carried out in Dunedin over a period of three weeks, in a South Island town in New Zealand. Participation in the study was voluntary and participants were assured of confidentiality. Despite some language interpretation it is believed that the respondents answered the questions honestly. All respondents that were approached completed the survey and no surveys were discarded.

A literature search was conducted and semi-structured interviewing was employed allowing more probing in

order to clarify and seek for explanations (Robson, 2011). A list of interview questions guided the semi-structured interviews; however, the flow of conversation was dependent on the answers given by the interviewee. The questions related to how accommodation operators and tourism organisations could better prepare themselves for the Chinese market and provide an authentic experience for visitors. Face-to-face interviews were conducted, ranging between 15 and 30 minutes in length. The audio-recorded interview data was transcribed and analysed against the survey data and secondary research.

RESULTS

The focus of the research was to look at factors that are the key drivers in influencing Chinese visitors when choosing accommodation in New Zealand. The majority of respondents were from Shanghai (21 per cent) and Jiangsu (Eastern China) (20 per cent). Another 8 per cent were from Guangzhou (Southern China) whilst 7 per cent came from Tianjin, North China and 7 per cent came from Henan, in Central China. The rest of the respondents were from other provinces in China but the numbers were less significant. The majority of respondents (34 per cent) were in New Zealand for 11-15 days, whereas, 18 per cent would spend over 30 days in New Zealand and 16 per cent between 6-10 days. Visitors staying for 16-20 days were 13, per cent and 12 per cent would stay 21-30 days. Three respondents were unsure of how long they would stay. The main purpose respondents gave for their visit to New Zealand was for a holiday (51 per cent), whilst 36 per cent indicated that they were visiting friends and family, 12 per cent were studying and 1 per cent on business. The majority of respondents (66 per cent) stated that their visit was 'just the right length', whereas, 18 per cent stated that it was too long, and 15 per cent said that it was too short.

Figure 1 represents the respondents' preference of accommodation with 48 per cent preferring to stay in a hotel while 32 per cent were very interested in bed and breakfast accommodation. Fifty one per cent of respondents also prefer to stay in chain hotels rather than other accommodation, and 10 per cent preferred to stay in 5-star accommodation, 36 per cent would stay in 4-star accommodation and 15 per cent would stay in 3-star accommodation.
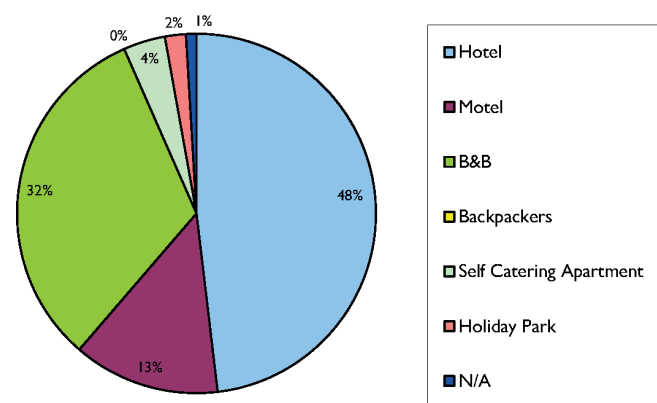
Table 1. Accommodation preferences.

The self-drive holiday travellers stated that all of their travel expectations had been met, whereas, 12 per cent of tour visitors suggested that their expectations had not been met through their experience in New Zealand. The key challenge for 55 per cent of the Chinese visitors was the language barrier. As they were unable to speak English, they found it very difficult to book their own accommodation or find suitable accommodation to match their travel budget as accommodation was expensive. Another issue raised was the difficulty in finding free Wi-Fi to keep in touch with family and friends in China. They also made comments regarding transportation (driving on the opposite side of the road, cost of public transport being high, and inconvenience or lack of transport options). Overall, respondents were happy with the customer service they received in New Zealand, with over 56 per cent being satisfied and 41 per cent being delighted. Only 2 per cent were unsatisfied, although they did not comment why.

Security, cleanliness of the room and staff friendliness were the three most important aspects for the Chinese visitors when staying in accommodation, whereas food and a central city location were not as important. Free Wi-Fi, signage in Chinese and free breakfast were rated highly. Figure 2 shows the level of importance.

Overall, 59 per cent of Chinese visitors rated the standard of accommodation in New Zealand as very good, 21 per cent thought it was excellent, but 4 per cent rated it as unsatisfactory. The respondents were asked what improvements could be made by New Zealand accommodation providers to ensure that their expectations were met of accommodation; of the 100 respondents, 33 stated that free Wi-Fi was important, followed by eight stating that there needed to be more Chinese employees or sign sin Chinese. Other responses included slippers, toothbrush and toothpaste, improved customer service, thicker duvet (room was very cold), to the provision of adaptors and two respondents commenting that accommodation was very expensive in relation to the quality.
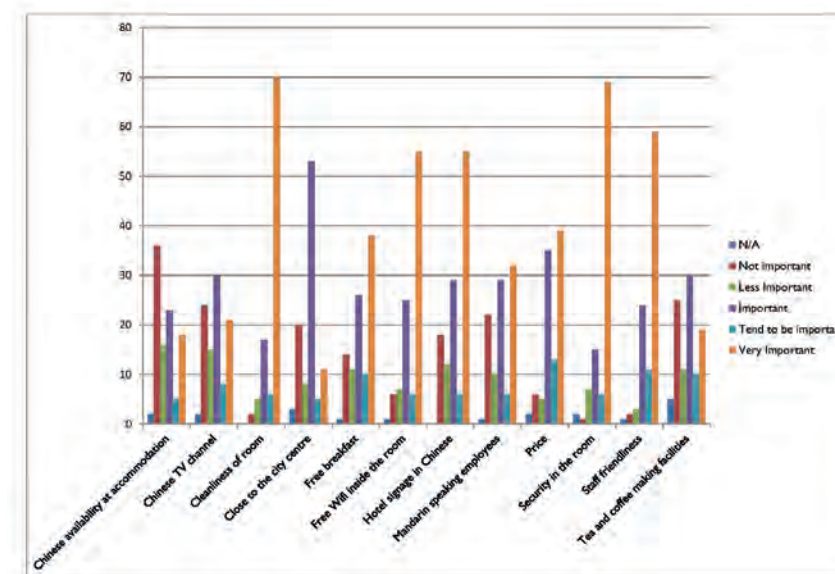

Table 2. Accommodation factors.

Interviews with accommodation providers highlighted the need for ensuring that New Zealand towns are 'China ready'. The interviewees commented that although Tourism New Zealand (TNZ) provide information, many smaller accommodation providers and attraction providers alike, have not necessarily taken this on board. They believed that accommodation operators not only needed to consider the needs and wants of Chinese visitors in relation to providing clean and comfortable accommodation but also other essential services. As many older visitors are unable to speak English, the need for Chinese signage and some simple and common phrases could be considered as beneficial. They highlighted the need for safety and fire hazard information in rooms to be in written in Mandarin. Greeting Chinese visitors in their own language was found to go a long way to demonstrate friendliness. They acknowledged that not every accommodation provider could be expected to employ someone with the language skills, but at 'least having common phrases written down and translations was often very helpful'. The Regional Tourism Operator (3) also stressed the importance of having menus and signs in Chinese as it is viewed as 'making an effort'. In contrast, Accommodation Operator (2) remarked that it is important to remember 'manaakitanga', which allows us to share some of our experiences and a unique New Zealand approach as well as being able to be good hosts to our international visitors.

Accommodation Operator (1) commented that since providing Chinese translations on their website, they have seen a slight increase in the Chinese visitor market, albeit only a 1 - 2 per cent increase, they are seeing a rise in this market share, and are equally aware of providing visitors with a Kiwi experience. They went on to state that word of mouth recommendations were important as well as referrals from familiarisation visits through Tourism New Zealand or the local regional tourism office. They also felt that it was important to provide features such as complimentary Wi-Fi.

The three Accommodation Operators also commented that they observed a contrast between the younger and older Chinese visitors. The younger visitors were looking for a 'Kiwi experience' – everything from the food offered to the attractions visited, as well as the accommodation. The Regional Tourism Operator stated that many of the

older visitors were likely to be seasoned travellers and that New Zealand is often their third or fourth overseas visit. However, for the younger generation this may be their first visit overseas and therefore they want to be able to experience a different culture. The Regional Tourism Operator also suggested that accommodation operators should be proactive in being able to provide 'little touches, such as having packets of noodles and green tea in the rooms' and also to consider 'what they may be able to discount, as they are likely to be asked'. They also confirmed that the younger generation were more adventurous with wanting a Kiwi experience, however, most visitors liked to have an 'Asian option for breakfast and in fact many Western visitors were not afraid to try it if it was available on the buffet!' In summary, all respondents were of the view that shopping and food experiences were important for many of their visitors, with purchases from merino wool, to honey and milk powder as essential items, as well as wanting to taste New Zealand lamb.

The Regional Tourism Operator highlighted that Chinese visitors were very conscious of brands, whether in relation to accommodation, food or fashion, and that Dunedin would benefit from having a renowned 5-star hotel. Nonetheless, they were satisfied to stay at Scenic hotels, as they are a 'kiwi' brand.

DISCUSSION AND CONCLUSIONS

As the Chinese outbound leisure traveller market continues to develop from Mainland China, it is important that New Zealand accommodation operators understand the changing needs and wants of this market segment and thus take the necessary actions in being able to offer suitable accommodation. Although a high percentage of Chinese visitors travel as part of a tour group and therefore do not necessarily make their own accommodation selection, their views must still be taken into consideration. There are a growing number of younger Chinese visitors travelling independently and selecting their own accommodation. As the respondents stated, many of the younger generation were travelling on their own either for leisure or on their honeymoons and made their accommodation selections based on their own research. They were also keen in gaining a 'Kiwi experience'.

The need for clean, comfortable, safe and secure rooms were ranked as important to the market, which corroborates the previous findings that safety and security were crucial factors in their accommodation selection decision (Knutson, 1988; Tsai, Yeung & Yim, 2011; Lockyer, 2002). Interestingly, there are changes in the importance of accommodation attributes, such as food and beverage not rating as highly, whereas in previous studies these ratings were identified as more important (Poon & Low, 2005). Safety and security were not only highlighted but there was genuine concern that there was often overcrowding in rooms with little understanding of the potential consequences. Staff friendliness was also ranked highly, which evidences the expectation of a people-orientated service. A key area for change for accommodation providers is the increasing need for access to free Wi-Fi. Albayrak and Caber (2015) found that an improvement in accommodation attributes increased the level of customer satisfaction. The availability of in-room technology amenities is on the rise and evolving rapidly. New Zealand accommodation providers needs to embrace the change to ensure they differentiate themselves in a competitive market. In-room technologies help accommodation providers to improve the tangible guest experience (Melián-González & Bulchand-Gidumal, 2016). Cobanoglu, Berezina, Kasavan and Erdem (2011) found that such technology provisions can influence a guest's overall satisfaction and future behaviours, such as revisit intention. Heo and Hyun (2015) found Wi-Fi as the most useful hotel amenity.

The concept of 'manaakitanga', loosely translated as 'hospitality', was also raised and plays a key role in Maori society and inspires the New Zealand visitor experience, summing up the act of welcoming and sharing (Ryan, 1997, Zygadlo, McIntosh, Matunga, Fairweather, & Simmons, 2003). Manaakitanga is one of three key values central to the New Zealand-Aotearoa Government Tourism Strategy 2018-2021 where manaakitanga "implies a reciprocal responsibility upon a host and an invitation to a visitor to experience the very best we have to offer" (Tourism New

Zealand, 2017, p. 5). This reciprocity of hospitality and respect from one individual or group to another is based on the values of 'mana' (prestige), which is reflected in culture, language and continuous efforts to be generous hosts. Therefore, accommodation providers need to ensure that they are welcoming to their visitors; this can be demonstrated through simple phrases in both languages and being open to the diversity across cultures. The concept of manaakitanga can be likened to 'guanxi' and the importance of being culturally sensitive, which is also about the cultivation of long-term personal relationships or 'special relationships' based on mutual benefits and interests (Howell & Shaw, 2001). Cultural experiences for tourists are viewed as personal understandings of their surroundings and that of the host community (McIntosh, Zygadlo, & Matunga, 2004) and most travellers want an authentic experience (Cohen, 2004) although these may be limited by the accommodation on offer within New Zealand.

One of the challenges to accommodation providers in New Zealand is continuing to understand how customers perceive the product or service attributes and their perceived importance to customers, and to welcome travellers with the warmth and reciprocity that is part of the Kiwi culture. This should be a key component of an accommodation provider's strategy to ensure they keep abreast of the changing needs and preferences of travellers. Future research can target more New Zealand destinations and draw comparisons across a wider variety of accommodation providers, products and service attributes.

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CHANGING HOW TOURISTS ACCESS THE GREAT KIWI EXPERIENCE: HIGH VALUE OR HIGH VOLUME?

Helen Geytenbeek

INTRODUCTION

The aim of this paper is to investigate the impact that increasing numbers of international tourists are having on the tourist destination of New Zealand. New Zealand (NZ) is a desirable destination in the world and is characterised by stunning scenery, white capped mountains, beautiful lakes and wide open spaces. The latest tourist visitor numbers to year ending July 2018 were 3,820,505 and are predicted to grow in 2019 (Statistics New Zealand, 2018). This paper discovered that high visitor numbers are having a negative impact on NZ's environment. Alternatively, Bhutan's restrictions on visitor numbers to its Kingdom are helping to sustain its natural environment and culture. By investigating Bhutan's model for sustainable tourism it is recommended that strategies are needed to radically reduce the quantity of visitors to NZ in order to sustain the fragile environment. Change is needed to help in the transition towards a more sustainable management of this tourist destination.

International Tourists are accessing Aotearoa NZ, translated from Maori as Land of the Long White Cloud, with increasing ease through improved air connectivity, transport, road access and accommodation options. Tourism is now NZ's largest export earner (Kantar TNS, 2019). International tourist numbers are predicted to increase to 5.0million by 2023 (Fitch Solutions, 2019). New Zealand's own population forecast is set to increase to 5.01–5.51 million by 2025 (Statistics NZ, 2019) which begs the question, can the infrastructure and environment withstand this influx of visitors? The increased inflow of tourists and population growth has "led to serious capacity constraints and infrastructure pressures, which risk compromising the international visitor experience, constraining future growth, and negatively impacting New Zealand's tourism industry" (Jenkins, 2018, p.1). In order for the tourism industry in NZ to move forward in a sustainable way while still driving economic growth for the country, there needs to be a balance in providing outstanding experiences for visitors and communities while protecting and maintaining the unique natural environment they are coming to experience (Luxon, 2019). As a tourism lecturer educating the next generation to be sustainable practitioners, the emphasis is put on the importance of tourism planning being the key to the sustainable management of a tourism destination.

To explore the question of whether NZ authorities have begun to put in place strategies to change how tourists are accessing the great Kiwi experience, this paper analyses the perceived NZ model of low value - high volume tourism and compares it to a more sustainable model of high value-low volume tourism, concentrating on the Bhutan tourist experience model as an example. Value over volume refers to a strategy of attracting tourists with an average daily spend greater than that of the average visitor's total holiday spend (Gardiner, 2016).

Bhutan took this more cautious approach towards tourism, designing a policy of high yield/low impact or high value/low volume tourism, aimed at providing high quality service to wealthy tourists who are interested in and sensitive to Bhutan's culture and traditions (Brunet, Bauer, De Lacy & Tshering, 2001).

This comparative analysis takes a brief overview of the emerging issue and proposes a potentially more sustainable model than is currently being adopted by looking at saturation point verses sustainability in the NZ context. Themes that relate to this issue are NZ tourism growth, management of tourism destinations and background to Bhutan.

NZ TOURISM GROWTH

New Zealand's tourism industry continues to record steady growth in an ever-increasing competitive market. According to Fitch Solutions (2019), "In 2019, total tourism arrivals are expected to increase by 5.7% to reach more than 4mil" (p.6). This increase in numbers and pressure on NZ's infrastructure and environment has led to a shift in the perceptions and attitudes of New Zealand residents towards tourists evidenced in the release of the latest 'Mood of the Nation' survey; a joint research programme run by Kantar TNS for Tourism New Zealand (TNZ) and Tourism Industry Aotearoa (TIA) (Kantar TNS, 2019). The report informs industry and government providing insights into New Zealanders' feelings about international tourism. While TIA's "2025 growth framework aims to increase the value of international and domestic tourism to $41 billion by 2025, [thus] the strategic focus is on building value rather than volume" (p.5). While the growth framework looks at increasing value over volume and encouraging off peak growth it does not go far enough in reducing the numbers of tourists to the country. According to *Mood of the Nation* (2019), visitor numbers are starting to impact negatively on New Zealanders' impressions of international visitor numbers in some regions of the country. These impressions are influenced by personal experiences and national media outlets. The top five areas that are of concern to the general population are increased traffic congestion, pressure on the infrastructure, environmental damage, accommodation shortages and general overcrowding (Kantar TNS, 2019).

The NZ Government has signalled the need for a more coordinated approach to a sustainable tourism future; working with local government, the tourism industry, regions and communities. However, "current tourism system features some out-dated policy settings and funding arrangements that were never designed to deal with the scale and pace of change that we have seen in the past five years" (mbie.govt.nz, 2018, p.1).

The Department of Conservation has taken steps to mitigate the impact of mass tourism on national parks and forests by introducing a trial-pricing differential for international visitors on four of its Great Walks. The seven month trial gathers valuable information on using a pricing schedule as a tool to manage visitor numbers (Department of Conservation, 2019). In the Queenstown Lakes District Council (QLDC) area the council plans to hold a referendum on a proposed visitor levy to help fund visitor related infrastructure and services for the whole of The Lakes District area (Queenstown Lake District Council, 2019). The referendum is in response to the increasing local pressure that visitor numbers are having on the infrastructure of Queenstown and the surrounding area. According to a report commissioned by QLDC Jenkins (2018) found that, "Queenstown faces a proportionately high international tourist load relative to its population, compared to other tourist centres in New Zealand, and this is projected to worsen" (p.1). The public and private sector are continuing to coordinate efforts to ease the strain socially, economically and environmentally on certain parts of the country by investing in sustainable tourism growth "ensuring there is investment in infrastructure to support growth [and] the destination is actively managed to reduce or mitigate negative impacts" (Tourism 2025 and Beyond, 2019 para. 4). Kelvin Davis, Minister of Tourism asserted, "We need value to grow faster than volume" (Davis, 2018, para. 20). As part of the new Government tourism strategy and supported by the private sector, that means attracting people in the off-season, getting people to visit more regions, stay for longer and spend more (Tourism Industry Aotearoa, 2019). While the new strategy appears to support the argument, in this paper of value over volume the strategy does not go far enough in reducing the numbers of inbound tourists. As a consequence the strain is beginning to show in parts of the country especially Queenstown, which is considered by many "to be the 'Crown Jewel of New Zealand's tourism industry, and central to national tourism success." (Jenkins, 2018, p.3). International tourists who visit Queenstown as part of their itinerary are more likely to visit other parts of the South Island which is 'three times higher' than if the tourist had not visited this destination (Jenkins, 2018). This benefits the other regions of the South Island but does nothing to mitigate the impacts of tourists to Queenstown.

Action needs to be taken to protect Queenstown. The strain on many areas is causing detrimental and irreversible effects on the beautiful landscapes that attract tourists from overseas. The *Mood of the Nation* (2019) report documenting New Zealanders' changing perceptions of international visitors is causing discontent, this is an example of one of many statements, "There's always lots of tourists around and too many of them end up destroying our scenic areas and the environment, overflowing camping grounds and freedom camping"(p.20).

While the 'value over volume' concept is worthy of consideration as part of the new coordinated strategies between the public and private sectors, it still falls short of reducing the number of tourists and their overall environmental impacts on the country. This is because the number of tourists is still growing in an uncontrolled fashion and "public infrastructure, already suffering from decades of under-investment, has struggled to cope when extra visitor numbers were added in some regions" (Roberts, 2019, p.3).

MANAGEMENT OF TOURISM DESTINATIONS

Other tourist destinations globally have experienced overcrowding, environmental impacts and damage to their reputation. Boracay Island in the Philippines, a tiny Island that was once considered one of the world's most idyllic destinations, was closed to the public in 2018 for a six month period for restoration. This happened after it was described as a "cesspool" (Morris, 2018, para.2) by the country's president. Mount Everest, the world's highest mountain in Nepal and a popular climbing destination has attracted some of the highest numbers of tourists ever to the mountain range. "This year Nepal issues a record 381 climbing permits, a number that does not include those climbers' accompanying guides" (Lange,2019,para.4), resulting in long queues to the summit and the death of 11 people. These examples of the impacts tourist numbers have on popular destinations and the fragile environment in which they are situated, can be seen as the results of number increases driven by economic, social and political motivations within these countries.

So, is it time for radical change? While New Zealand and Bhutan are comparatively different countries in terms of geography, population, religion, infrastructure, tourist numbers and political environment, its model of 'high value, low volume' tourism is worth investigation.

BACKGROUND TO BHUTAN

"The Kingdom of Bhutan is a small landlocked country located in the southern foothills of the Himalayan mountain range, sandwiched between the People's Republic of China in the north and the Republic of India in the south. It is a sovereign nation, with a total land area of 38,394 km² and a total population of 826,229" (Tourism Council of Bhutan, 2018). As of October 2018 tourism revenue contributed 17 million USD to the Bhutan economy with an influx of 274,097 visitor arrivals in 2018, which is an increase of 7.61% from 2017. (Tourism Council of Bhutan, 2018). McIntyre (2011) asserts that by only allowing another quarter of the percentage of tourists to population into the country helps to protect the natural environment and culture as part of the Bhutanese value system. This also helps to protect the traditional way of life in Bhutan, its tourism policy also reflects these values. In contrast, international tourists to NZ spent 16.2 billion NZD and the numbers entering the country were 3.82 million (Statistics NZ, 2019), almost as many as the current population of NZ (Tourism New Zealand, 2018).

According to Khamrang (2013), the modernisation of Bhutan began in the 1950s; prior to that it was a non-monetised economy that was isolated from the rest of the world. In 1974 the first tourists were allowed into the country and now contribute significant revenue to the economy, as mentioned above. Tourism numbers are controlled by the unique Bhutanese development model of 'high value/low volume' tourism. This religious-based sustainable tourism development model is distinctively different from the many contemporary development

strategies of other countries and particularly New Zealand which has a diverse mix of cultures. Khamrang (2013) asserts the main reasons that this model has been introduced in Bhutan is to "contain the process of acculturation and to protect the country's fragile natural environment" (p.7).

Tourism in Bhutan is controlled by restricting entry into the country. According to Smith (1981) the original mission of this strategy was to attract only the educated, affluent clientele willing to spend more time and money on an unusual experience. Similarly, Garung and Seeland (2008) argue that visitors to Bhutan are better educated about their social and environmental responsibilities within the country. Their visits are controlled by the Tourism Council of Bhutan (TCB) and all visas, travel permits, itineraries, bookings, tours, guides and transport must be organised through recognised Bhutanese tour operators.

The Government of Bhutan sets a tariff for visitors in a group of three or more at 200USD per person per night during the months of January, February, June, July, August and December, and includes daily accommodation, all meals, transportation, a licensed Bhutanese tour guide, camping equipment and transport for trekking tours. During the months of March, April, May, September, October and November the tariff is set at $250USD per night (Tourism Council Bhutan, 2019). This daily tariff includes taxes and a royalty fee of $65. This tariff goes towards free education, free healthcare, poverty alleviation, and building infrastructure provisions. As Teoh (2012) states, "Therefore, Bhutan's controlled tourism model provides direct transparent benefits as a 'common good' to its citizens" (As cited in Khamrang, 2013, p. 8). The daily average spend for tourists to NZ is currently 130USD (Statistics NZ, 2019).

An overriding feature of the Bhutanese way of life is their religious beliefs, in particular, their Buddhist spiritual values and their model of Gross National Happiness (GNH). Bhutan measures progress not by Gross Domestic Product but by the happiness of its citizens or Gross National Happiness (Tourism Council Bhutan, 2019). According to Gupta and Agrawal (2016) "the concept of happiness includes not only the subjective well-being, but also the concern for others as an internalised responsibility and harmony with nature as its important elements" (p.4). This philosophy, value system and the four main pillars of GNH help to ensure the sustainability of the culture, the people, the traditional way of life and the fragile environment in which they live.

Four Main Pillars of Gross National Happiness are:

1. Equitable and equal socio-economic development

2. Preservation and promotion of cultural and spiritual heritage

3. Conservation of environment and

4. Good governance which are interwoven, complementary and consistent (Tourism Council of Bhutan, 2019).

Change is proposed for the tourism industry in New Zealand in order to preserve and conserve the very environment that tourists come to experience as Manning and Dougherty (1995) asserted "unless responsible management practices are in place, the tourism industry can end up degrading the features on which its prosperity is based" (p.30). Since then the management practices have done little to preserve these features. By reducing visitor numbers, charging a daily fee and ensuring the income from tourists is utilised to maintain and improve infrastructure, this may help in alleviating the numerous impacts on popular destinations in New Zealand, thus sustaining them into the future. "Damage to New Zealand's international tourist image could potentially have even more serious and long-lasting impact on the national economy than the lost jobs and GDP" (Jenkins, 2018, p.36).

The New Zealand government has announced a new tourist tax of $35 per international visitor to be introduced in July of this year. "The $57-80 million that this will generate will be split between conservation and infrastructure

development" (Bramwell, 2019, para.4). This paper proposes that New Zealand goes further than just collecting revenue to support the infrastructure to try to sustain these numbers but that it adopts a destination management plan that limits the numbers and attracts high value visitors that will spend more.

This paper identifies the negative social and environmental impacts that international tourist numbers are having on the infrastructure and subsequent sustainability of the NZ tourism product. Policy makers need to consider change strategies in order to implement a model of high value over high volume as a way of restricting numbers but maintaining sustainable revenue channels and ensuring maintenance of a sustainable tourism product for the future of tourism in NZ. The change strategies suggested aim to drastically limit tourist numbers coming into the country and charge a daily levy to help support the infrastructure. Globally, countries have to balance the short term financial gain against the long term sustainable future of the places people want to visit and New Zealand's public and private sectors would benefit from looking at other tourism models to ensure a sustainable future.

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CHANGE AND THE CLIMATE CRISIS: ALIGNING URGENCY AND AGENCY

Peter Bruce-Iri

RESPONDING TO THE CLIMATE CRISIS

Opinions of the enormity of the climate crisis range from President Trump's denial (Jacobson, 2016) to the belief that we are experiencing the sixth mass extinction (Ceballos, Ehrlich, & Dirzo, 2017). In November 2016 on New Zealand television, Emeritus Professor Guy McPherson stated he could not imagine a human left on the planet in ten years, and that was three years ago (Newshub, 2016). More recently he has stated, "To put it simply, our fate as a species is sealed. We're headed for extinction in the very near term" (McPherson, 2018, para. 20). These perspectives are poles apart on a continuum of opinion. The deniers are not motivated to reduce climate crisis drivers, while others on the continuum face the dilemma of how to respond.
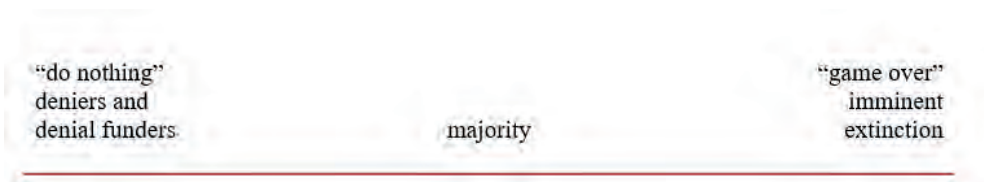

Figure 1. Climate crisis response continuum.

We can put aside the change response of two poles of the continuum, the 'do nothing' of the deniers, or those that fund denial campaigns, and the 'game over' response of those who believe in imminent extinction. What of the majority on the continuum who have varying degrees of concern, and might want to respond and act? Their responses might range from a sense of powerlessness to a strong motivation for action borne out of deep concern. Clear pathways of action are obfuscated by disputes over both the severity of the crisis and disagreement about remedies (Lovins, 2018).

HISTORICAL RESPONSES

Reflecting on our history illustrates the diverse ways that our forebears responded to existential crises revealing a confused response. The Bubonic plague that killed half of the European population (Routt, 2008) generated a range of responses from flagellation as an act of contrition to consumerist hedonism and fear (Johnson, 2018).

The HANDY study (Motesharrei, Rivas & Kalnay, 2014) identified collapses in our history precipitated by factors such as population decline, economic, intellectual and literacy decline, and political dynamics. The two underlying causes were resource depletion and the economic stratification of society (Mouhot, 2011). Those collapses were localised, or regionalised. However, we now face potential global socioeconomic collapse.

There are some commonalities in peoples' responses to existential threats across centuries. We consume resources to the point of collapse, favouring short-term consumption and immediate need (self-gratification) over conservation. Our bias is to ignore serious threat and sometimes respond by heightened consumption. Complex interlinked systems developed in the industrial age have reframed us with cultures of consumption. This cultural software (Covey, 2004) entangles us in webs of significance (Geertz & Darnton, 2017) that trap us in behaviours that deliver results that no one wants (Scharmer & Kaufer, 2013).

ACHIEVING CHANGE

Rao, Sandler, Kelleher and Miller's (cited in Green, 2018) domains of change model uses two continuums; individual to system level, and formal to informal to illustrate factors that support complex change. The two material factors are policy and resources. The other two are social norms and individual consciousness and capability, thus reinforcing the significance of individual and societal foundations of change.
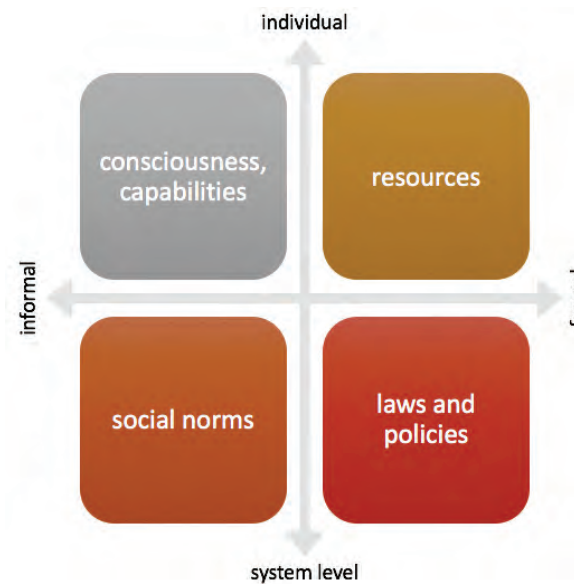

Figure 2. Domains of change model (Green, 2018).

Much of the technology we need to mitigate climate change is either available now or in development (Lovins, Wallis, Wijkman, & Fullerton, 2018). The greater challenge is to shift our thinking and behaviour. Green (2018) illustrates change dynamics with the movement to abolish slavery in the 18th and 19th centuries, providing an encouraging example of how people extended empathy across racial and geographic boundaries, and abandoning the concept or need for slaves as a cheap human energy source (Rifkin, 2016). The emerging industrial revolution provided a new alternate energy source and aided that transition, including powering the printing of pro-abolition pamphlets (Mouhot, 2011).

AGENCY, URGENCY AND CHANGE DYNAMICS

An individual's agency is critical to shift both social norms and individual consciousness and capability. Hope (as a cognitive trait) is supported by agency and pathways. Agency is a determination that goals can be achieved, and pathways envision and map a route to goal achievement. Snyder (1991, pg 281) defines hope as "a positive motivational state that is based on an interactively derived sense of successful (a) agency (goal-directed energy), and (b) pathways (planning to meet goals)." Bernardo (2015), further refined Snyder's model to consider the internal or external influences in the locus of hope.

Vision and goals add another compelling force to add impetus to agency and pathways (Snyder, 2000). The power of vision, or envisioning (Cammock, 2003) is broadly acknowledged. "Where there is no vision the people perish" (Proverbs 29:18, King James Bible) is perhaps the earliest recorded observation on vision. Conversely, depression and learned helplessness are associated with a loss of hope (Seligman, 1990) that may be cyclically reinforcing as impacts of the climate crisis intensify (Berry, Bowen, & Kjellstrom, 2010).

> *Believing that collapse is inevitable is one of the best ways to make it so, while believing in an alternative future is one of the only ways of giving it a chance of actually being realised (Lovins et al., 2018, pg xiii).*

Paul Hawken's (2018) Project Drawdown provides an example of pathways to mitigate climate change. It identifies the quantum of CO_2 equivalents (1,049 gigatons) that need to be removed from the atmosphere by reduced emissions or sequestration by 2050. It then ranks 80 solutions based on the quantum removed. This provides a clear target, pathways and potentially supports a sense of agency and hope. For example, reduced food waste ranks third in Drawdown's solutions, providing pathways of action accessible to most people – while in contrast, not everybody can afford to purchase an electric vehicle (ranked 26th). Paul Hawken (2018) opens pathways further by reconceptualising the climate crisis as not happening **to us**, but "for us – an atmospheric transformation that inspires us to change and reimagine everything we make and do – we begin to live in a different world" (Hawken, 2018 p xi).

A Finer Future also depicts a future where we have successfully met the challenge of climate change and transformed and created the requisite socio-economic systems and communities to prosper (Lovins et al., 2018).

New Zealanders take pride in our achievements as a small nation. In 1893 we were the first country to give women the vote, and have been described as a social laboratory based on innovations in the decades following female emancipation (McClintock, 1998). In addressing the climate crisis, the narrative changed. John Key, the Prime Minister from 2008 to 2016, characterised the nation as "too small to make a difference" thus influencing our individual and collective sense of agency. This narrative obfuscates viable pathways of mitigation options (Watkin, 2014) and diffuses personal accountability.

By contrast, Auckland University's Nikki Harré (2011) outlines three principles for a sustainable future: (1) positioning sustainability as a collective social enterprise; (2) developing positive strategies and; (3) engaging people in inclusive

co-design. She emphasises that positive emotions equip us better to find creative and complex solutions and avoid the paralysis of learned helplessness.

There must be caution around envisioning a utopian post-carbon world where we have reversed global warming and achieved an attendant transformation of society. The prognosis remains dire. Literature on leadership and change supports the need for a sense of urgency. Kotter's (1996) seminal eight step change model positions creating a sense of urgency as the first step.

The sense of powerlessness that our efforts make little or no discernible difference, may mean our fear of the future increases. The role of negative emotions is a political and media strategy Public health agencies use fear appeals, such as images of diseased organs on cigarette packets to motivate behavioural change in smokers. A meta-analysis of fear appeal research concluded that fear appeals can motivate attitude, intention and behaviour changes, but can also backfire if the intended audience do not believe they have agency to change. A high threat fear appeal must be accompanied by high efficacy messages, so the audience believe they can effect desired change (Witte & Allen, 2000). Deficit motivators have a role in effecting change. For example, Nobel Prize winner and founder of the Grameen Bank, Professor Muhammad Yunus's mission was motivated by eliminating poverty (Yunus, 2010).

Aligning agency and urgency

We must be concerned enough to take action on climate change, but not overwhelmed by the enormity of the challenge. Rather than perceiving fear and hopelessness on one pole of a continuum and hope on the other, it is helpful to attempt alignment. Aligning and balancing a sense of urgency with a sense of agency is more likely to precipitate engaged action (Snyder, 2000).
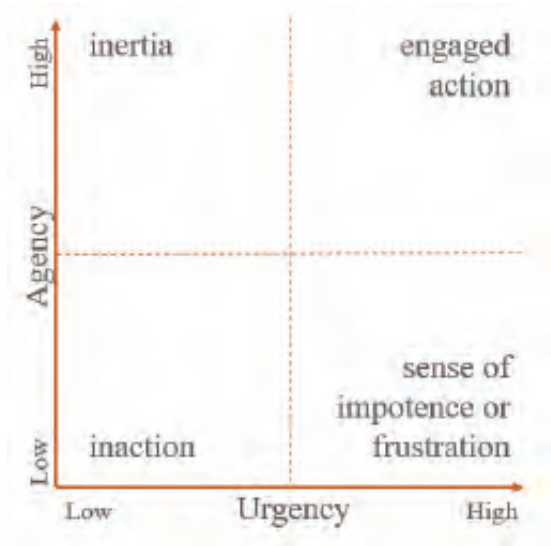

Figure 3. Aligning urgency and agency

As government policy is enacted to effect climate action and the efforts of organisations align, we can anticipate increased momentum for change (Lovins et al., 2018, New Climate Institute, 2016). This momentum can only be accelerated by leveraging all four dimensions of the change model presented above (Green, 2018). Individuals significantly influence what organisations and nations achieve and manifest. Even where many of these individuals

may perceive they have minimal agency, their decisions count as stated by Kanter (1997, p.495).

Every large and complex organisation has many thousands of people who have each day the opportunity, or are literally required, to take action on something. We think of these as "choice points." For an organisation to succeed in any long-run sense, these millions of choices must be more or less appropriate and constructive day in and day out. But this is an immensely difficult problem, because it requires the ultimate in decentralisation – literally to the individual level – along with centralisation in the sense that those individual choices must be coordinated and coherent.

These millions of choice points in a large organisation become billions considering that the climate crisis impacts the futures of all of us. The tools that organisations use to align goal-orientated effort will help to create synergies in creating policy, marshalling resources, and influencing individual choices and social norms. Some of these tools are explored next.

Vision, leadership and engagement

Century long advances in the field of humanities should equip us with the tools to better understand ourselves and how we work together. We are more likely now to accept that everyone, at least potentially, can better understand leadership processes. Peter Cammock's (2003) model highlights the importance of leadership through the dynamic interplay of envisioning, engaging and enacting. Envisioning as an active process is preferable to a vision supplied by others. Fritz (2014) suggests that people own what they create and so it follows that a more potent vision can emerge as more are engaged in its creation.

Leadership is also an interactive dynamic of self-knowledge and concern for others (Cammock, 2003). In the context of the climate crisis, this concern for others aligns with the call to extend empathy to our fellow humans (Rifkin, 2016). Consistent with conceptions of hope, research about engaging people in climate change has found effective messages are novel, capture attention, are personally relevant emotionally and rationally, and provide pathways for action. Meaningful engagement will bring the sustainability issue closer to people in time and space and touch on diverse impacts, such as health, without crushing hope by understanding the reality of the threat (Scannell & Gifford, 2013).

Brulle (2010) asks how might mass media or civic engagement campaigns better engage citizens to act. In New Zealand, we are yet to see Government led mass media campaigns on climate change (see Student March and demonstration for Minerals conference), with priority for government expenditure on campaigns such as smoking cessation and road safety.

SELF-AWARENESS AND INDIVIDUAL AND COLLECTIVE LEARNING

The huge productive capacity of the industrial age has forged consumerism into our identity. People consume in ways consistent with their sense of self (Escalas, 2013). Ingebrigtsen and Jakobsen (2009) add another layer of identity development in the shaping of us as economic actors, evolving from economic man, to social man, to ecological man. Our identity as consumers and economic actors potentially clouds our ability to see ourselves in relation to the climate crisis. Those of us centred in such identities may be locked into self-conceptions that prevent us from taking climate action in a manner similar to how the 'employee' (as a core identity) becomes the agent of his or her own oppression and his or her employee identity colonises home and other social intuitions (Deetz, 1995). It is incumbent on the education system and ultimately ourselves to reflexively explore, to find out who we really are.

Self-awareness is difficult for individuals to unpack, and is more complex when applied to groups of workers in organisations. Organisational learning is an underutilised discipline that clarifies how organisations generate, utilise, store and retrieve knowledge (Garvin, Edmondson, & Gino, 2008). Unfortunately, clustering people together in organisations typically creates learning impairments (Harper & Glew, 2008). The contest of ideas can lead to either creative synergies or defensive routines that inhibit learning (Senge, 2007).

As the climate crisis challenge we face is daunting we must optimise learning individual and collective learning. Rather than rely on culturally fragmented epistemologies, drawing on our global heritage of wisdom is more likely to generate the requisite knowledge for effective action. We can no longer remain anchored in Western reductionist world-views that exclude other perspectives. Indigenous peoples have associations with their landscapes that have reinforced a sense of respect and interdependence, and have typically been in the front line in protesting the advance of extractive industries (Hawken, 2018). In New Zealand, effective learning requires a rapid evolution of the partnership embodied in Te Tiriti o Waitangi.

CONCLUSION

The climate crisis will test our ability to change, perhaps more than any preceding existential threat. To galvanise action around the climate crisis provides a social challenge possibly greater than the material challenges. Hope springs from a sense of agency coupled with choices and pathways to achieve a vision sharpened by a sense of urgency. Solutions such as the Drawdown project offer a range of pathways. Further pathways are created as we seek to understand who we are in relation to the climate crisis thereby increasing our self-awareness, seek to engage with those close to us, and those in wider circles, and to make meaning of it all, individually and collectively through multiple cultural lenses.

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12 YEARS TIL BREACH

Pam McKinlay

Figure1. Pam McKinlay. A living poem and photo remnant of a performance by Pam Phlaterre reproduced from Pamphlette No. 6, published 2019.

Breach

There's a hole in my cryosphere.

You put it there.

Waters are rising,

imperceptible,

    the cup is half empty.

There's a hole in my glacier.

Waters are rising

    the saucer is half full.

Peter, come quick.

Waters are rising!

12 years

    - too long to sit over that cup of tea.

Drink up.

The saucer will breach.

INTRODUCTION

Breach is a living poem and photo of a performance remnant, by Pam Phlaterre reproduced here from Pamphlette No. 6, 2019.[1] The performance focused on the melting of the Franz Joseph Glacier, on the West Coast of the South Island, New Zealand, as a metaphor for global ice loss, through the notion of an impossible cup of tea from a leaking souvenir cup. There is a perforation in the side of the cup that makes the cup leak, creating tension as the tea line rises in the saucer and apprehension builds as the guest anticipates the imminent overflow of the saucer's contents. The poem calls on a young heroic character, Peter from an old Dutch story, who once stemmed the flow from a leaking dike by placing his finger in the hole, thus keeping the dike intact and saving the surrounding countryside from flooding. The hole is a metaphor for runaway climate change. There is no way to plug this hole by a single noble action. And yet the poem is an urgent call to action to stem the breach. Individual action can be the start to global economic change, with a collective call to governments to step up and regulate with policies that can stem the rising tide.

BACKGROUND

A perceived shortcoming of science research outputs is the use of specialized language (including mathematics and complex statistics) and a resulting lack of public engagement with graphs and charts as the primary visual language. The goal of the Art+Science project is to generate a creative response rather than illustrating or making a representation of the science. Engagement requires an emotive connection. Artists engaged in the project seek visual pathways by which a public audience can "get it". The theme for Art+Science in 2019 is "Art+Water: Mountains to the Sea". Artists and scientists participating in the project this year aim to highlight the impacts of land use on water from the mountains to the sea, and *Breach* is a work that came out of the 2019 project.

For my part in this project, I am working with scientist, Geoff Wyvill, with reference to the timeless work of prominent nineteenth-century Irish physicist, John Tyndall. Tyndall was an avid mountaineer who pondered the structure and motion of glaciers in his book, *The forms of water: in clouds and rivers, ice and glaciers* (Tyndall, 1896). He is often cited as the father of climate change for his work on the properties of gases to absorb radiant heat and his speculation on how fluctuations in water vapour could be related to climate and hence to ice formation. His work is still held in high regard and the leading UK Climate Change research centre, the Tyndall Centre, is named after him.[2] *The forms of water: in clouds and rivers, ice and glaciers* first looks at glaciers, the effect of melting, forms of ice retreat and the role of carbon dioxide and other gases in the global water cycle. I am working on three pieces, one of which is a response to the retreat of the Tasman Glacier and these will be exhibited in September 2019 at the HD Skinner Annex of the Otago Museum.

GLACIERS NEAR AND FAR

The annual glacier survey by the Snow and Ice Research Group New Zealand (SIRG, 2019) reveals that the state of glaciers in Aotearoa New Zealand are in a rapid retreat phase.[3] This can be seen graphically in photo sequences of the rapid retreat of the Franz Joseph Glacier. "Between 1893 and the end of its last big retreat 90 years later, in 1983, Franz Josef Glacier receded about 3km." The retreat has accelerated and guided walks onto the glacier are no longer possible, with access to the upper ice only by helicopter (Mills, 2012).

Franz Joseph is our local microcosm of what is happening in the cryosphere globally. Scientists predict that tipping points and runaway feedback loops from melting glaciers will accelerate in twelve years if we fail to curb carbon emissions. Elizabeth Kolbert, in *Song of Ice,* asks us to imagine an ice cube, which when left on a picnic table melts in a predictable way. She contrasts this with the massive glaciers in Greenland which are subject to feedback loops which in turn spawn sub-loops and further feedback loops in a complex unpredictable feedback system. Water accumulating on the surface affects ice reflectivity and as more of the sun's energy is absorbed melting increases, and so the cycle loops and builds on itself. She quotes a remark by Professor Marco Tedisco who calls this "melting cannibalism" (Kolbert, 2017, 96). She concludes that at a certain point these feedback loops become self-sustaining and it is possible that such a point has already been reached (McMahon, 2018).

The effects of melting ice in glaciers are predicted to be pulses of meltwater release. Arctic ice is predicted to disappear within five years, and this in conjunction with the weakening of the Greenland ice sheets and loss of ice mass in the Himalayas (Kaufman, 2019) would see sea level rise by seven metres (McMahon, 2019). Various scenarios have then been proposed about what will happen when ocean currents warm and the ice shelf buttresses have dissipated and the Antarctic glacier sheets also free to flow, in the subsequent meltwater pulse scenario (Viñas, 2018; Surging Seas, 2019).

Kim Stanley Robinson, writing in *New York 2140,* describes a future society in which social chaos and economic depressions would follow the first and second meltwater pulses. These are predicted to be caused by the collapse of the Greenland ice sheet and the ice shelf buttresses in Antarctica (as above) at which point, melting would double with increasing atmospheric and ocean warming, the loss of the sea buttresses which mean the land glaciers lose their footing in the sea and are free to flow. At this point, one-eighth of the world's population would be directly impacted, one-third of food production would disappear and shipping would be adversely affected by changing coastlines and currents, and unpredictable weather at sea (Surging Seas, 2019).

As record heatwaves, flooding, wildfires and mass die-offs of coastal shellfish come to our attention, we fail to act on these reports as dire warnings. Instead, the messengers are treated as hysterical or peddlers of pseudo-knowledge. Dr Katherine Hayhoe interviewed by Sonia Smith, (2017, 299) said that,

> *If you study literature you don't have to spend a lot of time convincing people that books are real. If you study engineering, most people will agree that engineering is real and its and important part of our society. But I study something that about half of the country and much more than half of Texas think is a complete hoax. Many people view having climate change at Texas Tech as similar to having a Department of Astrology. But we don't use crystal balls, we use supercomputers, we rely on physics, not brain waves.*

OF GODS AND KINGS

Day after day we are exposed to news reports that say we must 'deal' with the problem of global warming and climate change, but we seem not to notice or are incapable of joining the dots. We don't like complexity and prefer simple solutions. We look for simple rules and manufacture reasons to give them authority. In the past it was god/s or kings. Today, as we tread water in the sixth extinction event, the desire for economic growth underlies economic policies. Growth is seen as good, more growth is better and growth means profit. We scan the horizon looking for the saviour and some prophets invoke 'technology' as our great hope. We will need new technologies to adapt but the elephant remaining in the room is growth. Our current rates of consumption are at the expense of our biosphere, provision of essential bio-services (such as oxygen production) and raw materials, and are unsustainable.

We continue to add carbon dioxide to the atmosphere at an increasing rate and fail to account that it will take millennia for the earth to recalibrate (not in our or our children's life times). Kolbert summarises this "The climate operates on a time delay… In effect, we are living in the climate of the past, but already we've determined the climate's future" and "once feedbacks take over, the climate can change quickly, and it can change radically" (Kolbert, 2017, 113). Kim Stanley Robinson (2017, p.140-141) in *New York 2140,* uses the analogy of compound interest to explain exponential impacts of excess carbon emissions, driving a complex system which, without constraint and limits, will reach a tipping point beyond which there is no resolution.[4] The US Department of Defence calls climate change a "threat multiplier", because it exacerbates all existing problems (Smith, 2017). Yet as I write, the US government of the day is dismantling measures to curb carbon emissions rather than intensifying those efforts, for example with the "Affordable Clean Energy Rule" (2019) designed to weaken environmental regulations in favour of expansion of so-called "clean coal" for coal-fired plants.

1.5 DEGREES CELSIUS

A report last year by the Intergovernmental Panel on Climate Change (the IPCC) concluded that while it is technically possible to cap global warming at 1.5 degrees Celsius (2.7 degrees Fahrenheit) by the end of the century, it is highly unlikely because this would require a dramatic overhaul of the global economy, including a shift away from fossil fuels (IPCC, 2017).[5]

I pick up the story again in *New York 2140*, where solutions to climate change in the story were deemed too expensive

> *Economists could not help but be dubious. Because prices were always right, because the market was always right, right? So, these new-fangled inventions, so highly touted by those neo-Malthusians still worried by the Club of Rome limits-to-growths issues. Could we really afford these things? (Robinson, 2017, p.381)*

How can we not? Economic solutions along the line required by the IPCC would require a world refocus, rapid decarbonisation and oversight, if not interference, in market forces as we pass peak oil. We need to rethink our priorities for energy return on energy investment priorities for the future – another gas guzzling car or the means to create regenerative energy systems and transport solutions for the masses? More single use plastic bottles and cling wrap, or something a bit more useful like a catheter tube? (Krumdiek, 2012) What might the new economic rubric be?

> *The land ethic simply enlarges the boundaries of the community to include soils, waters, plants, and animals, or collectively: the land. A thing is right when it tends to preserve the integrity, stability, and beauty of the biotic community. It is wrong when it tends otherwise. (Leopold, 1949, p.262)*

What's good for the greatest number is what's good for the land (Leopold, 1949), rather than being indebted to a system of economics that serves the profits of the few. In effect, a post-growth economy with prosperity for more where we live within the means of our environmental bio-capacity (Jackson, 2017).

BREACH – A PERFORMANCE

I return now, to the situation of the melting glaciers. To recap, the melting is being caused by excess carbon emissions which are fuelled by rapid carbonisation of our atmosphere, a product of our post-industrial revolution which depends on the burning of fossil fuels. The glaciers are spilling their waters at an increasing rate and contributing to rising sea level. I enter now the accompanying photo and poem, which were documentation of a remnant from a performance piece, as part of my research response. We return the focus to the Franz Joseph Glacier.

During the performance a guest was handed a plate with a delicious slice of cake on it and as they began to eat, the performer poured tea from a tea pot, delivering an engaging stream of conversation whilst innocuously pouring the tea into the cup. The guest felt increasing anxiety as the pourer blithely poured tea into the cup, but hesitated; there was still time and it would be rude to interrupt the interesting anecdote. The pourer seemed oblivious of either the leaking vessel or the fact that the tea was approaching the rim of the cup. Finally, the guest could bear it no longer and interrupted the anecdote feeling the need to intervene because the saucer was getting dangerously full.

The Cup

It is a tea cup. Tea cups are symbolic of many things – think "storm in a tea cup", "over the tea cups" and "Another cup of tea, Vicar". Tea cups have an association with conversation, planning for the future or even foreseeing the future, as in "reading the leaves." From politics (think Epsom talks between John Key and John Banks during the 2014 General Election) to relaxed chats with friends. However, this is a cup fraught with danger, you can't have a relaxed drink from it. The lines that ask "Is the cup half empty? Is the saucer half full?" are a nonsense juxtaposition. They are a nod to the common phrase, generally used to ask the rhetorical question, should a situation be a cause for pessimism or optimism, however neither view in this scene-ario is cause for optimism.

What is it about this souvenir cup? It is a memento mori – based on one of the iconic landscape photographs of this glacier which has circulated since the first half of the twentieth century (NZ Stamps).[6] It aspires to be more than a tacky trinket by finding itself on a cup of the finest of bone china by Royal Grafton, made in England, the old country. It is a souvenir image of a place that doesn't exist in this form today. The glacier has retreated from the view and the panoramic window now frames a gravelly terminus, and by the end of the twenty-first century the glacier may not exist at all. The Franz Joseph Glacier will soon inevitably spill its way down the Waiho River and flow out to sea.

"There's a hole in my cryosphere"

I don't think there is any doubt about that if you have read this far, that there is a problem with the cryosphere, nor the cause. There is of course no "hole" in the glacier through which the water streams. The notion of a "hole" makes invisible the visible and suggests the notion of the "hole" in the ozone, a planetary calamity averted last century. Until 1987, ozone damaging gases were being released into the atmosphere weakening the ozone layer in the Earth's ionosphere, which protects the earth from UV-B radiation, and hence posed a severe threat to human health. Collective global remedies, instigated through the 1987 adoption of the Montreal protocol, banned the most damaging of these gases; chlorofluorocarbons (CFCs), halons, carbon tetrachloride, and methyl chloroform. Consequently the ozone layer began the process of healing (Montreal, 2018). Glaciers too are being weakened by invisible gaseous interactions in the atmosphere. If we fail to act, the cryosphere (like the ozone layer before it) will become dangerously depleted, and the flow on effects will be disastrous in terms of sea level rise, changes in climate and changes in ocean chemistry (ocean acidification).

Although a minor glacier on the world stage, the disappearance of Franz Joseph Glacier will add little to the rising sea levels globally, compared to the ice loss from the Himalayas, Greenland, Victoria and Antarctica, but locally its loss will be greater. On the home front, the West Coast will lose a major tourism attraction as the Franz Joseph Glacier becomes a deserted moraine.

"You"

Yes, you and yes, me. We all need to take responsibility for the causes of this crisis and act to remediate it in any way we can. The image of the church on the cup indicates the hope of salvation. We might pose the question – what does your faith tradition demand of you in the face of such overwhelming evidence for climate change? Your God demands some response from you – you can count on it – right from the opening chapters of Genesis "And let them have dominion…" (The Bible, Genesis 1:26 ff). The contract you have with your belief system requires you attend to this matter of stewardship in return for your soul's salvation. What will it be – what will you DO to stem the tide of this unmortal engine that is nearing its tipping point of run-away climate change?

"Peter – come quick"

I grew up in a street of Dutch immigrants and this story may not be familiar to all. Considering the urgency of rising sea level and the tea water pouring from my hole, it seemed pertinent to call on Peter of Haarlem, to hasten to my side to do his duty once more, not only for that low-lying country but for my lovely tea cup (Sweetser, 1910). There is another obvious association with Holland in that we (New Zealand) are named after Zeeland - itself named for

its proximity to the sea (Sealand) and one of the Netherland's coastal lowlands considered most vulnerable to sea level rise. In the nineteenth century tale of "the little hero of Holland", it is the actions of a young selfless person which save the day.

Our modern-day hero is a young woman with pigtails from nearby Sweden, Greta Thunberg. Earlier this year she was nominated for a Nobel Peace Prize for her climate activism (Smith, 2019). She quietly slipped onto the world stage two years ago with a simple personal message which called her government to action to stop to runaway Climate Change. Since then she has inspired global movements such as School Strike for Climate and Extinction Rebellion and more.

Greta reminds me of another childhood heroine of mine. A young girl of independent spirit, and a keen sense of justice, also a sense of personal agency to prompt change, none other than Pippi Longstocking, of Astrid Lindgren's books. Of Swedish origin and sporting trademark pigtails, they both have a propensity to tell it straight to adults. There the similarities may end. Pippi comes from a time of pre-peak-oil childhood innocence. Greta quietly holds her own calling for action amidst a planetary crisis, which many seem to wilfully ignore, wielding a sword of truth with intelligence and a fierce maturity, which make her seem more like a young modern-day warrior princess (move over Xena) albeit sans the boy-fantasy leather costuming.

"12 years"

Twelve years indicates the window for action. To paraphrase Ralph Chapman, we are living in a period of "useful consciousness" – this is our (only) window in which life-saving action is possible (in Macfie , 2015). In 12 years, the world will have lost significant glacial ice, and this will have an irreversible impact on rising waters, affecting every aspect of society. As I wrote that last sentence, I found out we had lost a year. We now have 11 years (United Nations news 2019).

"Too long to sit over that cup of tea"

We are a long way from the streets of rebellion as we return to the tea cup and yet the call to action is the same. In the performance the performer set out to induce a sense of anxiety in the guest with the potential spilling of the tea beyond the containment of the saucer. The guest had to act urgently to interrupt and intervene to stop the pouring to prevent a breach. Here we are talking about a regular sized tea cup, but scale is everything. One small tea cup, one small breach and a small puddle on the table to clean up. One small glacier drying up, one small town struggling for survival. Massive ice sheets melting will have massive social consequences from the meltwater pulses. The Pamphlette (an artwork of poem and image) does not offer solutions. It's a postcard from the impending crisis and urges the participant to move, to act, to interrupt, to DO something to remedy the imminent spill. The glacier is melting. The water is leaking from the hole. Even when the performer ceases blithely pouring tea into the cup, the tea continues to stream out of the hole. The stage is already set, the story half written. Without actual intervention from the guest, the tea would have continued to be poured but has the guest altered the course of the story in time? Will the saucer breach?

Pam McKinlay has a background in applied science and history of art. As an artist she works predominantly in sculpture, weaving and ceramics and photography in collaboration with other artists locally and nationally, in community outreach and education projects around the theme of climate change, sustainability and biodiversity.

ENDNOTES

1 Pam Phlaterre is the non-de plume under which Pam McKinlay publishes Pamphlettes which accompany performances and exhibitions.

2 Tyndall Centre for Climate Research, n/d/ Retrieved 26/6/2019 https://www.tyndall.ac.uk/

3 Rate of loss is increasing: NZ Glaciers: "Huge" loss of ice in 40 years, 9 April, 2019, https://www.odt.co.nz/news/national/nz-glaciers-huge-loss-ice-40-years, New Zealand's glaciers could disappear almost completely by 2100, https://www.newshub.co.nz/home/new-zealand/2019/04/new-zealand-s-glaciers-could-disappear-almost-completely-by-2100-scientists.html [Retrieved 26/6/2019]

4 In the story he explains exponential Growth with the Legend of Paal Paysam Retrieved 26/6/2019 from http://www.singularitysymposium.com/exponential-growth.html

5 What have we learned from our excursion into the last deglaciation? Could polar ice sheets collapse catastrophically, as in the past? Full Report from the IPPC here: https://www.ipcc.ch/sr15/

6 Built in 1931, St James Anglican Church was built to take advantage of the view through the altar window. The photo has been taken by many and was reproduced in the peace stamp series of 1946.

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