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Andragogy and Workplace Relationships: A Mixed-Methods Study Exploring Employees' Perceptions of Their Relationships with Their Supervisors

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by

Erin M. Klepper

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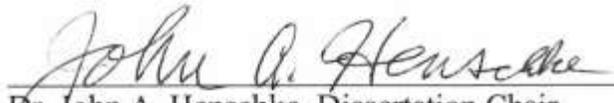
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Declaration of Originality

I do hereby declare and attest to the fact that this is an original study based solely upon my own scholarly work here at Lindenwood University and that I have not submitted it for any other college or university course or degree here or elsewhere.

Full Legal Name: Erin Marie Klepper

Signature: _Erin Marie Klepper_ Date: 10/27/17

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Lastly, I would like to thank all of the strong women in my life, especially my mother and grandmothers. It was the strong women in my life that taught me how to not only dream big, but work hard to accomplish those dreams. They taught me that the secret of accomplishing anything worth having required four ingredients: (a) faith in God above all else, (b) faith in myself, the (c) perseverance and (d) humility. Over the years, I have worked to remember each of those ingredients, so that the children in my life may one day, too, be inspired by strong women.

Abstract

The purpose of this mixed-method study was to explore employees' perceptions of their relationships with their direct supervisor, and to determine why employees chose to remain at SSM Health. This study used a three-part research design comprised of quantitative Likert scale rating statements, Henschke's (2016) Modified Instructional Perspectives Inventory — Employees and Direct Supervisor (MIPI-EDS), and a qualitative open-ended survey-questionnaire to also explore how managers were perceived by their employees. By using Henschke's measurement tool in alignment with questions/statements from Parts I and II of the survey-questionnaire, relationships between the andragogical principles as measured by the MIPI-EDS and other components, such as job satisfaction and employee length of service, were able to be examined. Specifically, this research study used andragogy to explore whether the factors of the direct supervisors identified by their employees, as measured by MIPI-EDS, were predictors of the employees' job satisfaction and their length of service.

This study invited 448 employees of SSM Health who worked in specific departments throughout the Patient Business Service division to participate. All eligible employees had the option to participate in Parts I and II, while only employees who had been with the organization longer than five years were eligible to participate in Part III. At the end of the study, 100 employees participated in Parts I and II, and 49 of those 100 employees participated in Part III.

The data revealed unexpected findings. In Parts I and II, there was no correlation found between the factors identified by the employees on the MIPI-EDS and the employees' length of service with the organization. There was a significant correlation

between the factors on the MIPI-EDS identified by the employees and the employees' level of job satisfaction. In Part III, survey-questionnaires were analyzed using open coding methods and eight themes emerged as the reasons why participants chose to remain with SSM Health. Among the reasons, the top reasons that people chose to remain at SSM Health were: a) peer impact, b) relationship with direct supervisor, and c) genuine happiness/intrinsic motivation. Part III of the survey-questionnaire was also analyzed to potentially identify common themes that were related to the perceived level of job satisfaction of the employees who had been with the organization for longer than five years. After analyzing specific statements in Part III of the survey-questionnaire, two conclusions were identified: (a) the role of the supervisor impacted whether or not each employee liked his or her job and, (b) there were five main themes that supervisors needed to focus on in order for employees to like their actual jobs. Those themes were: (a) managerial appreciation and recognition of employees, (b) supervisor's providing of emotional, and mental support, (c) employee individualization, (d) clear two-way communication between the supervisor and each employee, and, (e) expectation of high performance. Lastly, this study aimed to determine trends that could be identified from the experiences of past employees. Due to unseen circumstances, this piece of information was severely limited to the secondary data received from SSM Health. From the secondary data provided, past employees identified that the top two reasons they had left SSM Health in the last five years was 'direct management,' and 'normal retirement.'

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Chapter One: Introduction

Since the beginning of the new millennium, the global markets have constantly changed and evolved. Corporations of every size sought to identify the factors that provided consistent success to their organizations. Experts in the field of organizational development (OD) found, "dynamic business environments require rapid, decentralized decision making in order to meet evolving customer needs" (Atkins, 2016, p. 125). As knowledge of global markets continued to mature, organizational learning emerged as a crucial factor in OD.

Organizational learning started with the employee's perceived relationship with his or her direct supervisor. Just as university professors impacted students' learning and culture in the classroom setting, employees' supervisors impacted employees' learning in the workplace. Therefore, andragogy adult learning theory and its principles may apply to organizational learning.

An employees' perceptions of his or her supervisor had an impact on job satisfaction, organizational learning, and organizational trust. "If managers wish to influence the performance of their companies, the results show that the most important area to emphasize is the management of people" (Patterson, West, Lawthorn, & Nickell, 1997, p. 21). Those in management roles could apply adult learning theory that emphasizes the importance of elements such as self-directedness, experiential learning, use of learning contracts, problem centeredness, goal orientation, and internal motivation in learning (andragogy) to facilitate the learning of their employees much as coaches apply andragogy to facilitate learning of their athletes (Najjar, 2017). In the dissertation, *A Case Study: An Andragogical Exploration of a Collegiate Swimming and Diving*

Coach's Principles and Practices at Lindenwood University, Najjar (2017) contended, "Almost all the recounts of successful sports coaching, in either a team or individual type sport, feature some form of discussion of the role of self-directedness, experiential learning, learning contracts, problem centeredness, goal orientation, and especially – internal motivation" (p. 5). It may, therefore be the case that a relationship existed between organizational learning and employees' perceived relationships with their supervisors.

If organizations desired to develop their employees, they needed a foundation built on trust, respect, and learning (Edmondson & Moingeon, 1999; Harrington, 2000; Vatcharasirisook, 2011). In 2010, Yang and Mossholder found that when employees perceived their supervisors and organizations to be trustworthy, they felt respected. When they had the opportunity to continuously learn, the employees felt empowered. "Operationally speaking, empowerment is critical, because in our fast-changing environment, a lack of it [empowerment] will impair employee responsiveness" (Atkins, 2016, p. 125). When organizations displayed a culture focused on trust, respect and learning, innovation, and growth followed.

Background

A glance at employee retention and turnover levels offered greater insight into the health of an organization. The relationships that employees had with their peers and supervisors were among the most common reasons that people chose to stay or leave their organizations. Brown (2001) argued that the main reason why employees chose to leave their facilities was the relationship they had with their supervisor. Bennis and Nanus (1985) recognized that it was trust that connected subordinates to their organizational

leaders. The perceived relationship that an employee had with his or her supervisor impacted the amount of trust that the employee had within the organization as a whole. "Interpersonal trust building begins as early as during the recruitment process and stage of initiation" (Ikonen, Savolainen, Lopez-Fresno, & Kohl, 2016, p.119). When supervisors established a tone of trust within their departments, the employees had the opportunity to develop new skills and a love for life-long learning as well as impact the organization (Dirks & Ferrin, 2002; Yang & Mossholder, 2010; Xiong, Lin, Li, & Wang, 2016). Organizations that encouraged creativity, innovation, and life-long learning could expect to be more productive and competitive in the job force. In 1994, Garvin emphasized that in order to support organizational learning, management must foster an environment that was conducive to informal and formal learning. Organizations must consider the role of life-long learning in order to be innovative and compete with competitors across global lines.

While organizational learning was absolutely crucial to OD, it was highly unlikely in an unhealthy organization because it was often difficult to build healthy organizational cultures if employee retention was low and turnover was high. According to Dey (2009), continuously low employee retention and high turnover suggested the possibility of organizational instability.

There were many factors that employees considered before choosing to leave an organization. Money was not always the primary factor. "People leave the organization due to various reasons" (James & Mathew, 2012, p. 79). In 2012, James and Mathew noted that job related stress, lack of commitment to the organization, and lack of employee job satisfaction were all factors in determining whether an employee chose to

stay with that organization. "Organizational culture itself can be motivating to employees. Some organizational cultures can be inspiring to their employees and provide an inductive environment to their employees" (James & Mathew, 2012, p. 78). Several authors agreed that the organizational environment could impact how an employee viewed the overall organization (Dirks & Ferrin, 2002; Hytter, 2007; Ikonen et al., 2016; Kim, D., 1993; Kim, S., 2002; Xiong et al., 2016). If the organizational environment impacted how the employee might view the organization, it could be the case that positive organizational environments that were built on trust and learning were uplifting to employees, while abrasive, or distrustful environments bred animosity, and cynicism within employees.

It was the individual culture of organizations that set the stage for the experiences of the people that it employed. Firms with high organizational learning levels where employees were open to learning were capable of thinking independently, were able to display creativity on an individual level, and were more likely to be successful (Kiziloglu, 2015). Regardless of whether adult learners were sitting in a classroom or participating as part of the active workforce, they were always learning. Adult learners in educational settings were encouraged to take an active role in their learning and were able to grow significantly inside and outside of the classroom setting. The same was true within an organizational employment setting. When employees were encouraged to analyze, synthesize problems, and find solutions through the usage of collaboration and creativity, employees and the organization both reaped the benefits.

While establishing a culture that led to employee retention in an organization seemed relatively easy, it was no simple task. "Reducing employee turnover can be

challenging for some organizations" (O&P Business News, 2008. p. 14). The relevancy

of employee retention and turnover had not shifted dramatically since the beginning of

the new millennium. In 1997, Herman found that "workforce stability is a powerful

competitive strategy and will become even more vital in the foreseeable future" (p. 15).

Herman's prediction was still relevant at the time of this writing, and would continue to

be in the future. When employee retention was high, the long-term employee who was

skilled in his or her job role became a great resource to the entity. In many cases, long-

term competent employees, who were skilled in their job roles, were great assets to many

organizations, and brought a great deal of experience and expertise to their job roles.

Although longevity was not required for one to be considered competent, it often was

helpful. "Competent employees are necessary for organizational performance . . . there is

a need, therefore, to identify and examine how best to retain these competent employees

for the achievement of the goals and objectives of organizations" (Gberevie, 2008, p.

143). Competent employees were no longer considered a luxury, but a necessity to

thriving in future's global markets and those current to this writing.

Creating organizations with many seasoned, long-term competent employees was

not without a very expensive cost. Turnover and retention were both expensive on a

variety of levels. For example, companies lost a significant amount of money and

resources when new employees decided to leave the organization abruptly. It was not

uncommon for new employees to leave organizations after completing an initial period of

job training. "For many companies, turnover is an investment loss because time and

money are often devoted to employee recruiting and training. Additionally, there are

other indirect issues that can be affected by turnover, such as productivity and customer

service" (O&P Business News, 2008, p. 14). When organizations lost new employees,

money was not the only factor at risk. They lost both direct and indirect resources that

could not easily be replaced, if at all. "Employee turnover is costly in terms of direct

costs and indirect costs faced by organizations" (Wang, Wang, Xu, & Ji, 2014, p. 398).

While money could be re-earned, the time and energy spent to train new employees

within organizations could not be replaced when employees did not stay with their

organizations. "Voluntary quits represents an exodus of human capital investment for

organizations" (James & Mathew, 2012, p. 78). The indirect knowledge and job role

experience resource that employees took with them when they chose to leave an

organization also had a cost. Organizational development expert Herman (1997) argued,

"if you have to fill the same position several times during the year with periods when the

position is open, your costs of keeping the job filled multiplies" (p. 16). All of the

knowledge and experience acquired during the course of individuals' time with the

organization was taken away when individuals left for a different organization.

Employers who lost employees to other organizations would benefit by finding out why

employees left organizations and what they could do to entice the then-current employees

to remain.

        Organizations spent significant amounts of time, money, and other resources

annually on developing programs that would help lower their turnover rates and entice

then current employees to stay within the organization. Some of these programs included

bonus-structured programs, or other external rewards systems to recognize employees.

"Organizational capabilities can be thought of as both tangible (e.g., physical assets) and

intangible resources (e.g., organizational culture, learning capability, teamwork, trust,

experience) as well as the capability to deploy these resources and to acquire additional

external resources when needed" (Johnson et al., 2014, p. 51). Although costs varied

from one organization to the next,

> it has been estimated that, on average, it costs a company one-third of a new
>
> hire's annual salary to replace an employee. At Missouri's 2015 minimum wage
>
> of $7.65 an hour, the cost to replace just one employee is more than $5,000."
>
> (Mushrush, 2016, para. 5)

In addition, "indirect costs include learning costs for new employees; the costs of

being short staffed, with knock on effects for remaining employees; and costs to the

quality of products or services, which can in turn result in lost customers" (Cheng &

Brown, 1998, p. 138). When organizations retained their competent employees,

organizations saved money, time, or resources that could be allocated into other areas of

the entity that allowed the organization to grow economically or socially.

There are significant links between the fields of andragogy, and OD. Andragogy

is "the art and science of helping adults learn" (Knowles, 1980, p. 43). Wuestewald

(2016) argued that andragogy and the professional arena were linked because applying

the principles of andragogy was considered an effective way to transfer knowledge to the

context of the professional work being completed by the employee. Knowles (1990)

inferred that adult students brought their own knowledge and previous experiences to

their learning environments, which also included their workplace organizations. Adults

developed an appreciation and an internal motivation within their learning environments.

Building positive, trusting relationships between employees and their direct supervisors

was consistent with the principles of andragogy. As mutual trust and respect of the

employee and manager was established, the possibility that the employee would be able to learn, grow, and to take calculated risks improved. "Trust forms a foundation for cooperation in workplace relationships" (Ikonen et al., 2016, p. 119). Andragogy was also vital to OD because the more employees trust and are valued, the higher the levels of job satisfaction and the concept of job embeddedness. "Trust is emerging more and more as an important intangible asset in organizations and their leadership to enable change and improved performance for achieving strategic goals" (Ikonen et al., 2016, p. 119). Andragogy focused on the motivation to learn continuously and to perform tasks in order to meet real-time objectives and issues.

This study also explored a possible relationship between the perceived characteristics of supervisors, as perceived by the employees, based on andragogical principles of learning and job satisfaction impacting employees' intentions to continue working within the organizations. Although there were limited studies that focused on andragogy within the work place, there were reasons to believe that andragogy in the organizational work place could benefit employees and organizations alike. Throughout the write up of this study, I define organizations as learning institutions. I define supervisors as adult educators. Lastly, I define employees as adult learners.

Purpose Statement

The purpose of this study was to explore employees' perceptions of their relationships with their supervisors, within a section of a division of a large not-for-profit healthcare organization to determine why employees chose to stay with their organization. This research study focused on using an adapted version of Henschke's (2016) Modified Instructional Perspectives Inventory — Employees & Direct Supervisor

(MIPI-EDS), surveys, and questionnaires, to investigate the perceptions of employees employed within the organization in order to increase my understanding how organizations, specifically supervisors, are perceived by their employees (Henschke, 1989). Henschke's (1989) Instructional Perspectives Inventory (IPI) was originally used to measure the beliefs, feelings, and behaviors of adult learners and their instructors in academic settings. The MIPI is a modified version of the IPI. The MIPI-EDS was developed in 2016 and was adapted to fit the needs of this specific study in an organizational setting rather than in an academic setting. The Instructional Perspectives Inventory Factors sheet and the Scoring Process sheet were not adapted, but were still valid to use for this study.

Specifically, this research study explored whether the factors of the direct reports identified by their employees through the use of the MIPI-EDS were predictors of the employees' job satisfaction and employees' length of service. "Many researchers have explored factors that influence employees to leave their organizations; however, few researchers have studied factors that influence employees to stay with their organizations" (Vatcharasirisook, 2011, p. 4). This study was for the latter purpose.

Until 2009, "no research has provided empirical evidence of its [the learning organization's] positive links with employee attitudes such as job satisfaction" (Chiva & Alegre, 2009, p. 324). Additionally, I wanted to explore how an andragogical approach focused on the art and science of helping adults learn, could potentially be used to increase employee retention rates and lower turnover rates within organizations.

Hypotheses and Research Questions

H_1: There is a relationship between the supervisor's factors identified by the data collected on the employee's MIPI-EDS and the employee's length of service to the organization.

H_2: There is a relationship between the supervisor's factors identified by the data collected on the employee's MIPI-EDS and the level of job satisfaction that an employee feels within his or her job role.

RQ1: Why have employees within the Patient Business Services (PBS) division of SSM Health who have been employed within this organization for more than five years chosen to remain within the PBS division of SSM Health?

RQ2: What, if any, common themes are related to the perceived level of job satisfaction of the employees who have been with the organization more than five years?

RQ3: What, if any, trends could be identified from the experiences of past employees?

Scope of the Study

The first hypothesis focused on the relationship of the perception of supervisor's factors identified by the data collected on the employee's MIPI-EDS and the employee's length of service with the organization. The second hypothesis explored the relationship between the levels of job satisfaction that the employee felt within their job role and the supervisor's factors identified by the data collected on the employee's MIPI-EDS.

The research questions focused on the experiences of the employees. The first research question asks why the long-term employees within this division opted to remain with the organization over a period of five years, and what experiences they encountered

that gave them the desire to remain within this particular hospital system. The second research question focuses directly on common themes that may be perceived by employees regarding job satisfaction. It asked if employees who had been with the organization longer than five years felt more satisfied with their jobs than employees who had not been with the organization at least five years. The last research question posed a limitation to the study, which is discussed in the limitations section of Chapter Five.

Definitions of Terms

Andragogy: "The art and science of helping adults learn" (Knowles, 1980, p. 43).

Beliefs: What an individual accepts as truths. "Beliefs are learned values and behaviors held by supervisors towards subordinates that affect the educational process" (Vatcharasirisook, 2011, p. 8).

Behaviors: Activities designed to provide support to the learners in the process of reaching their goals (Vatcharasirisook, 2011, p. 8).

Feelings: "Feelings are the emotional perspective(s) of the supervisor and subordinates toward each other" (Vatcharasirisook, 2011, p. 8).

Division of organization: This is a collection of departments that are all categorized under a similar umbrella of functions.

Employee-centered: This is an atmosphere where the "attention focused on learning" (Vatcharasirisook, 2011, p. 10) and is orchestrated by leadership, and has become an integral part of the organizational environment. This was what the employee was learning, how the employee learned, the conditions under which the employee learned, and whether the employee actively applied the knowledge he or she learned to his or her job.

Employee retention: "The process of making employees [desire] to stay with the organization" (Aruna & Anitha, 2015, p. 94). "Employee retention among other things leads to satisfied employees leading to satisfied customers leading to improved bottom line." (Dey, 2009, p. 45).

Exit interview: I defined this as the interview that is held between Human Resources and an employee as he or she is about to leave an organization. This offers the employee the opportunity to discuss the employee's reasons for leaving and his or her experiences while working for the organization.

Job embeddedness: Those employees who become part of a network that connects them to an organization, ultimately reducing turnover within that organization (Holmes, Chapman, & Baghurst, 2013). Job embeddedness is achieved by meeting the needs of the employees (Holmes et al., 2013).

Job satisfaction: "Job satisfaction is the sense of fulfillment and self-esteem felt by individuals who enjoy their work. It is the pleasurable emotional state resulting from appraisal of one's job as achieving or facilitating one's job values" (Vatcharasirisook, 2011, p. 8).

Modified Instructional Perspectives Inventory - Employee & Direct Supervisor, or MIPI-EDS: This is a modified version of the IPI developed when I started the study and is specific to this study. The MIPI was based on the IPI, a 45-item questionnaire that was developed by Dr. John Henschke (1989, 2015), which contains seven different factors of the IPI. The MIPI-EDS measures seven different factors:

Factor 1: Supervisor's level of empathy with employees. Empathetic leaders or teachers tend to respond to the learners learning needs. Empathic leaders pay close

attention to the development of a warm and bonding working relationship with employees.

   Factor 2: Supervisor's trust of employees. A relaxed and low-risk environment is an important factor in establishing respect and trust. Respect and trust between the supervisor and employees is created by avoiding threats, negative influences, and allowing employees to take responsibility for their learning.

   Factor 3: Planning and delivery of instruction. Using an andragogical approach, the supervisors plan learning facilitation, which involves employees in the planning process. When employees take responsibility for their learning, they are committed to their success. Employees are also involved with their own evaluation. Feedback is included in the planning process.

   Factor 4: Accommodating the employee uniqueness. Supervisors apply distinct learning facilitation techniques to each employee. All employees have their preferences in learning styles and methods. Supervisors consider employees' differences in motivation, self-concept, and life experiences for the subject to be learned.

   Factor 5: Supervisor insensitivity towards employees. It is the behavior of the supervisor that influences the learning climate. A lack of sensitivity and feeling also influences the learning climate that an employee feels within the organization. When failure to recognize the uniqueness and effort of employees occurs, the bond of trust and mutual respect does not occur.

   Factor 6: Experience-based learning techniques. (Employee-centered learning process). The supervisor focuses on group dynamics and social interaction so that employees apply the subject learned, according to what the supervisor has in mind.

Employees need to play an active role in the work and learning process. Employees have different accumulated learning experiences and these lessons learn control is a major part of their learning.

*Factor 7: Supervisor-centered learning process***.** The supervisor takes control of the learning. This is defined as student-centered process; it is the supervisor's ability to communicate information as a one-way transmission from direct report to employee. Employees have a passive role in the supervisor-centered process.

One-Up: I defined this as the nomenclature used within SSM to describe the individual's supervisor.

Organizational development: "Organizational development (OD) is a systematic and planned approach to improving organizational effectiveness" (Vatcharasirisook, 2011, p. 8).

Organizational Learning Capability, or OLC: This "is defined as the organizational and managerial characteristics that facilitate the organizational learning process or allow an organization to learn and thus develop into a learning organization" (Vatcharasirisook, 2011, p. 9). The Organizational Learning Capability (OLC) instrument is used to measure learning in organizations (Chiva & Alegre, 2009). There were five dimensions of the OLC:

*Dimension 1: Experimentation***.** "The degree to which new ideas and suggestions are attended to and dealt with sympathetically . . . that experimentation involves trying out new ideas, being curious about how things work, or carrying out changes in the work progress" (Chiva & Alegre, 2009, p. 326).

***Dimension 2: Risk taking*.** "The tolerance of ambiguity, uncertainty, and errors" (Chiva & Alegre, 2009, p. 326). In 2011, Vatcharasirisook stated "effective organizations accept and learn from failure and mistakes" (p. 16).

***Dimension 3: Interaction with external environment*.** "Scope of relationships with the external environment" (Chiva & Alegre, 2009, p. 326). In the professional arena, "interactions with the external environment play a major role in organizational learning and development" (Vatcharasirisook, 2011, p. 16).

***Dimension 4: Dialogue*.** "A sustained collective inquiry into the processes, assumptions and certainties that make up everyday experience" (Chiva & Alegre, 2009, p. 328).

***Dimension 5: Participative decision making*.** "Level of influence employees have in the decision making process" (Chiva & Alegre, 2009, p. 328). By creating an atmosphere of supportive decision making, "organizations benefit by increasing employee involvement, job satisfaction, organizational commitment, and ownership of decision outcomes" (Vatcharasirisook, 2011, p. 17).

Patient Business Services, or PBS: The division of the organization that is responsible for revenue collection and management within SSM Health.

PBS educator: Educators that teach the courses needed to meet staff regulations within the PBS division of SSM Health.

Respect: The "esteem for a person and a person's ideas, opinions, abilities and values" (Vatcharasirisook, 2011, p. 9).

Sisters of St. Mary (SSM) Health: The 20+ hospital health care system that focuses on caring for a variety of people within the region.

Supervisor-centered: "Supervisor-centered is the attention focused on the supervisor, what the supervisor says and does. The supervisor gives instruction to their employees to do their jobs" (Vatcharasirisook, 2011, p. 10).

Three-part research study: A study design that I used to collect and analyze the data that was provided by the employees of the PBS division of SSM Health. The survey-questionnaire was broken down into three parts. In Part I and Part II, data were collected from any person from the pool of 448 people that chose to participate in the study. Part III data was only collected from those people who already completed Parts I and Part II and who were with the organization longer than five years.

Trust: The belief that someone is reliable, good, honest, and effective. It relies on the character, ability, strength or truth of someone.

Significance of Study

This study was significant for six reasons. First, while there was a great deal of literature focusing on how many organizations worked to develop programs to retain their employees and how organizations recruited employees, there was very little literature that focused on the perceptions and experiences of employees working with their supervisors. It may be the perceptions of their relationships that led to retention issues and high turnover rates in some organizations. If customer service research provided insight into what was occurring, employee research provided insight into why it was occurring (Dumitrescu, Cetina, & Pentescu, 2012). Second, this study was significant because there were minimal studies focused on retention in the field of healthcare. Third, this study was a mixed-method research study; there were a limited number of studies that involved both quantitative and qualitative data. Vatcharsirisook's study (2011) was a

quantitative study that focused on relationships that employees had with their supervisors.

Fourth, this was a significant study for the specific organization researched. I was

informed that this particular organization had never seen a research study quite like this

before that focused on the perceptions of the employees. Fifth, it was also a significant

study because it was rare for the employees of this organization to be asked to participate

in a study that was both quantitative and qualitative. Sixth, this study was significant

because it focused on employees in the Midwestern region of the United States and

specifically in the field of healthcare only, rather than healthcare, banking, and

hospitality.

Chapter Two: The Literature Review

Chapter Two is divided into four major sections: (a) andragogy, (b) organizational development and learning, (c) employee job satisfaction and organizational trust, and (d) employee retention and turnover. Each section of Chapter Two is important in its own right, but when all of the elements referenced in Chapter Two function together, organizations thrive. The andragogy section of the literature review focuses on the history of adult education as it pertained to this study. The organizational learning section of the literature review focuses on the history and importance of learning within organizations. The job satisfaction section of the literature review focuses on how employee job satisfaction impacts whether an organization is capable of growth. The organizational trust section concentrates on how employees view the trust level with their peers, trust with their manager, and trust within their organization, and themselves. Lastly, the employee retention and turnover section of this literature review focuses on how low retention and high turnover of employees impacts the vitality of the organization.

Andragogy

Andragogy is the teaching and learning of adults. Andragogy was defined as "the art and science of helping adults learn" (Knowles, 1980, p. 43). In 1989, Knowles (1989a) precisely defined andragogy as a "model of assumptions about learning or a conceptual framework that serves as a basis for emergent theory" (p. 112), rather than merely a theoretical viewpoint based in the field of adult education. Andragogy focused on how adults learned inside and outside of the classroom environment.

Unlike pedagogy, andragogy was a much younger concept. While pedagogy had been around for centuries, andragogy was a relatively new way of viewing how adults learned. Brookfield (1984) argued that Knowles referred to andragogy as "an empirical descriptor, summarizing what he considers to be deriving the chief features of adult learning and development, and, from this summation, a set of teaching [facilitating] procedures to be used with adults" (p. 190). Knowles was often credited with being a leading producer in the field of andragogy. Because of his assumptions of andragogy and the principles of adult learners, others were able to develop facilitation procedures that reflected the spirit of andragogy. Mezirow (1981) maintained that andragogy was a self-directed, flexible approach to learning and developing critical thinking skills. Adult learners desired to be self-directed and to develop skills that were relevant to their experiences. Classrooms with adult learners shifted from teacher-centered to student-centered. Andragogy functioned as a process that allowed adult learners to continuously learn and grow. Brookfield (1983, 1984, 1987) asserted that andragogy was the ability to combine a variation of beliefs, and desires together under a unique umbrella of professional practice as adult learning. As the concept of andragogy continued to evolve, it became a force within the educational community. Since its initial conception, it spread across multiple disciplines, and various topics.

While the term 'andragogy' lacked the same international reputation that pedagogy earned over the course of centuries, andragogy was "becoming a rallying term to identify theory, research and practice in the realm of adult education in some countries, while finding resistance in others" (Henschke, 1998, p. 1). As time passed, it was more acceptable to facilitate learning environments with student-centered methodology in

mind. Anderson and Lindeman (1927) referenced that teaching adults was different than teaching children. They acknowledged the following:

> Life itself is the adult's school. Pedagogy is the method by which children are taught. Demagogy is the path by which adults are intellectually betrayed. Andragogy is the true method of adult learning. In andragogy theory becomes fact; that is, words become responsible acts, accountable deeds, and the practical fact which arises out of necessity is illumined by theory. (pp. 2-3)

It was difficult to transition the mindset of being teacher-centered to being student-centered in a classroom setting. American children were taught to learn in a setting that was teacher-centered, whereas, andragogy encouraged adult learners to focus on their own passions.

While the term andragogy was frequently associated with Knowles (1971, 1990, 1991, 1994) because of his contributions to andragogy, he was not the first in the field. "The term 'andragogy,' as far as we know, was first authored by Kapp, a German high school teacher" (Henschke, 2009, p. 2). While Knowles was important to the field of andragogy, he merely enhanced a concept that had previously been developed.

In Kapp's book (1833) entitled, *Platon's Erziehunglere* (Plato's Educational Ideas), he described what it meant to be a life-long learner. In *Platon's Erziehunglere,* there was a chapter entitled, 'Die Andragogik oder Bildung im maennlichen Alter' or "Andragogy or Education in the man's Age," that specifically outlined educational content that directly related to adult learning. Kapp (1833) argued that some of the most influential values in humanity revolved around education, self-reflection, and character

development. All of those factors closely tied into the assumptions and the principles of andragogy.

After the original coining of the term andragogy, the term laid dormant for a number of decades. It is plausible that adults were still frequently learning, but there was no specific term utilized to reference that learning. Henschke (2009) argued, "Adult education was being conducted without a specific name to designate what it was" (p. 4). Adults did not just start learning one day. Adults had always been learning, but there was never a specific name given to that action. It was not until the 1920s that another theorist made strides in the field of andragogy. Rosenstock-Huessy (1925) insisted that andragogy was the only method that had the potential to rebuild post-World War I Germany and the German people. He recognized that the assumptions of adult learners were especially pertinent to the German people, because they were motivated to rebuild Germany, and ready to learn from the mistakes of their past. Rosenstock-Huessy (1925) viewed andragogy as advantageous, because adults constantly brought prior knowledge to re-evaluate the circumstances they faced in the present.

Henschke (2009) supported Rosenstock-Huessy's concept by stating, "All adult education (andragogy), if it is to achieve anything original that shapes man, which arises from the depths of time, would have to proceed from the suffering which the last war brought them" (p. 4). Rosenstock-Huessy (1925) perceived andragogy as a fundamental element of examining historical events. He perceived andragogy as a way to unite the past with the present and future. "Historical events are to be analyzed for what can be learned from them so that past failures might not be repeated" (Henschke, 2009, p. 4). Rosenstock-Huessy (1925) viewed andragogy as opportunistic. Rosenstock-Huessy

(1925) no longer viewed andragogy as a different or better method to teach adult learners, but as the only method that could provide support to the post-World War I German people. He associated the experiences of the post-World War I Germany to andragogy and thought their experiences were problem-centered and relevant. Rosenstock-Huessy (1925) interpreted andragogical theory as something that could easily be transferred to practical application. Andragogy may have been intended for adults in a classroom setting, but it actually provided solutions to a plethora of situations inside and outside of the classroom setting.

It was not until the 1920s that Lindeman (1926a) first brought the philosophy of andragogy to the United States. Although he referenced andragogy as an effective method for teaching adults, the term andragogy still lacked a place in educational vocabularies for decades. Through andragogy, he asserted that the best method for teaching adults was the usage of discussion. At the same time, Lindeman (1926b) argued that pedagogy was different than andragogy because of its connection to discussion, even though, the term andragogy was never actually mentioned in his book, *The Meaning of Adult Education*. In the chapter, "In Terms of Method," Lindeman (1926b) provided an inclusive inquiry of this discussion method. Consequently, because of his contributions in 1926(b), some of the earliest foundations of what was, at the time of this writing, considered andragogy were developed. After the writings of Lindeman (1926a, 1926b) were published, there was an additional lapse of time before the term andragogy would be published in the literature again.

In 1966, the term "andragogy" was given new life (Knowles, 1989b, p. 79). Knowles (1971, 1990, 1991, 1994) provided a theoretical philosophy that identified and

unified adult educators across the globe by conceptualizing the Principles of Adult

Learners. Knowles' perception of andragogy, "the art and science of helping adults

learn" (1989b, p. 43) "is built upon two central, defining attributes: first, a conception of

learners as self-directed and autonomous; and second, a conception of the role of the

teacher as the facilitator of learning rather than the presenter of content" (Pratt, 1998, p.

12). Knowles (1989b) elaborated his experience with the concept of andragogy:

> I had an experience that made it all come together. A Yugoslavian adult educator,
>
> Dusan Savicevic, participated in a summer session that I was conducting at
>
> Boston University. At the end of it he came up to me with his eyes sparkling and
>
> said, 'Malcolm, you are preaching and practicing andragogy.' I replied,
>
> 'Whatagogy?' because I had never heard the term before. He explained that the
>
> term had been coined by a teacher in a German grammar school, Alexander Kapp,
>
> in 1833 . . . The term lay fallow until it was once more introduced by German
>
> social scientist Eugen Rosenstock in 1921, but did not receive general
>
> recognition. Then in 1957 a German teacher, Franz Poggeler, published a book
>
> 'Introduction into Andragogy: Basic issues in Adult Education,' and this term was
>
> then picked up by adult educators in Germany, Austria, the Netherlands, and
>
> Yugoslavia[1] . . . (p. 79)

Like many of the theorists before him, Knowles (1971, 1990, 1991, 1994) conceptualized

what he thought adults would appreciate both inside and outside of the classroom setting.

Knowles was a visionary. He recognized that andragogy could reach many different

fields of study.

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[1] It needs to be noted that while Knowles recalled that this conversation took place in 1967, Sopher (2003) found through detailed research that it occurred in 1966.

In 1968, Knowles published his first article entitled, "Andragogy, Not Pedagogy,*"* (Knowles, 1968a). This article was important to the legacy left by Knowles, because it was one of the first times that there was an identifiable difference laid out between the way children learned and the way that adults learned in a classroom environment. During this time, Knowles (1971, 1990, 1991, 1994) became strongly affiliated with the concept of andragogy and started to receive widespread acknowledgement throughout North America and various other English speaking countries. Also in 1968, Knowles started using andragogical methods while teaching leadership training of the Girl Scouts. Even though this methodology was new, the Girl Scouts openly embraced the diverse methodologies of andragogy. (Knowles, 1968b). While working with the Girl Scouts, Knowles encouraged the Girl Scout Leaders to take a more active approach to their own learning as well as to continue to develop topics that they were passionate about (Knowles, 1968b).

By 1969, Knowles took to teaching andragogically in all of his adult education classes at Boston University.

> He used the approach of group self-directed learning as the means for implementing andragogy. Thus, he helped groups of students take responsibility for learning as much as they were able concerning a part of the subject matter of the course." (Henschke, 2009, p. 6)

As a result, the students began actively taking responsibility of their individual learning within the classroom setting. The learners were actively engaged throughout the remainder of the course. Pratt (1998) emphasized that in environments with adult learners, the learners' choices played a consistent and active role in how the learner

retained the information. The learners were more productive and actively engaged if they

had input as to what and how they learn (Pratt, 1998). The learners developed a sense of

ownership that was not there previously. The students were able to actively pursue the

content provided to them through the methodology that best suited their individual

learning needs.
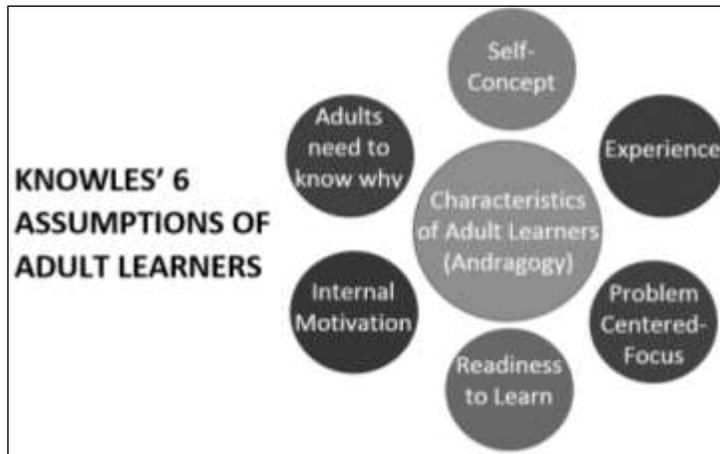
Figure 1. Knowles' 6 Assumptions of adult learners. The information in this graphic can

be attributed to Knowles (1980, 1984).

In the book, *The Modern Practice, of Adult Education: From Pedagogy to*

Andragogy, Knowles' (1980) four assumptions about the characteristics of adult learners

were distinctly different than the characteristics of pedagogy (Knowles, 1984). The six

assumptions were:

Self-concept: As an individual developed and matured, his or her self-concept

shifted from being one of a dependent personality towards one of a self-directed

autonomous adult learner (Knowles, 1984).

Adult learner experience: As an individual matured, he or she gathered an

accumulation of experience that became a plethora of resources for learning (Knowles,

1984).

Orientation to learning: As an individual continued to develop, his or her perspective of time shifted from a postponed application of learning towards one of immediate application of learning. Also, his or her mindset shifted from subject-centered learning to a mindset of solution-centered learning (Knowles, 1984).

Readiness to learn: As an individual matured, his or her readiness to learn became aligned with the tasks expected of his or her social roles (Knowles, 1984). Since then, Knowles added two more assumptions (Knowles, 1984). The assumptions were:

Motivation to learn: As an individual matured, the motivation to learn shifted from external to internal (Knowles, 1984).

Adults need to know why: Adult learners needed to know why a concept was relevant to what they were currently doing (Knowles, 1984).

Along with the six assumptions of adult learners, Knowles (1984) was responsible for the development of the Four Principles of Andragogy (Figure 2). The two concepts were parallel to each other. The Four Principles were:

Adult Learners need to be involved: Adult learners need and desire to be involved in the planning and evaluation of their learning (Knowles, 1984).

Adult Learners have previous experiences: Adult learners rely heavily on their past experience to continue to develop in the future. The experiences that adults have encountered, including their mistakes, provide the basis for how they will continue to learn in the future (Knowles, 1984).

Adult Learners value relevancy: Adult learners are typically most interested in learning about topics that have an immediate relevance and impact to their current job role, or personal life (Knowles, 1984).

Adult Learners are problem-centered: Adult learners are problem-centered rather than content driven (Knowles, 1984).
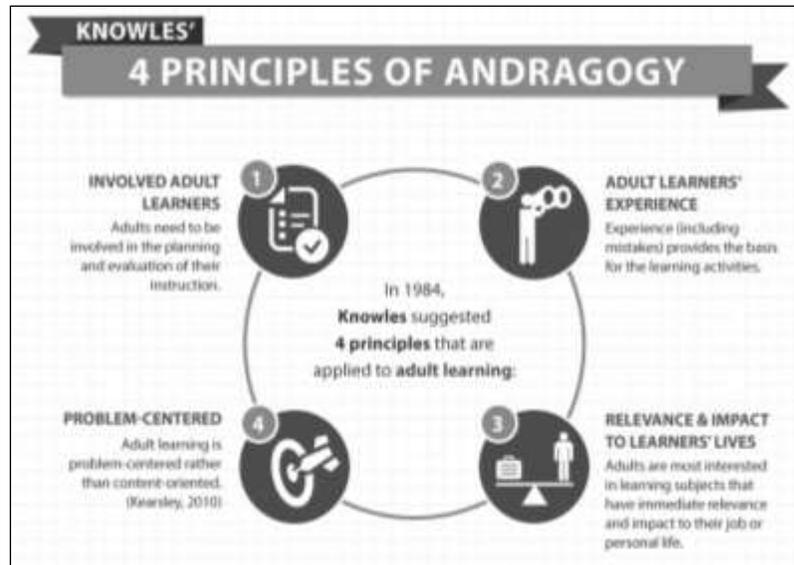
Figure 2. Knowles' 4 Principles of andragogy. Infographic image printed with permission (Pappas, 2017).

Because of Knowles' (1968a, 1968b, 1980, 1983, 1984, 19989a, 1989b, 1990a, 1990b, 2002) work in the field of andragogy, these assumptions and principles spilled over into a variety of other fields including Organizational Development(OD), Biblical research and societal transformation.

Cooper and Henschke (2003) acknowledged another advancement of Knowles' in the field of andragogy. Knowles advocated for his learners to be actively involved in the material they were learning, and he also advocated for the advancement of adult learning as well. Cooper and Henschke (2003) noted that Knowles encouraged various adult

learners, and those who educated adult learners to conduct research, and publish their

findings. Knowles also encouraged autonomy so that educators could research and

develop their own understanding of content.

While Knowles openly provided major strides of progression in the field of

andragogy, his understanding and projection of andragogy was certainly not without its

criticisms. Van Gent (1996), Ferro (1997), and Reichmann (2004) all were outspoken

with criticism of Knowles' andragogical philosophy. The biggest similarity between all

three theorists was that andragogy was not intended to be a sole method of teaching; that

andragogy was intended to be a supplement to additional approaches.

Dutch scholar, Van Gent (1991,1996), asserted that andragogy was a trend that

faded in and out of the educational spotlight. Van Gent's (1996) main criticism came

from the implication that the Knowles' concept of andragogy was intended as a "specific,

prescriptive approach" (Van Gent, 1996, p. 116). He made the implication in his article

that andragogy was never intended to be a solitary approach used to teach and to facilitate

adult learning, but to be supplemental to other approaches. Van Gent (1996) suggested

that adult learners used their previous experiences, both inside and outside of the

classroom environment. If adults used their previous experiences in every applicable

situation, they also relied on previously suitable methodology to learn.

Another critic, Ferro (1997), affirmed that it was Knowles that started a popular

wave of andragogy within the United States, but may have produced more confusion than

clarification. "Although andragogy has neither established itself universally among

educators as a viable theory of learning for adults nor, as a term, entered the common

American parlance, theorists and practitioners alike still have created a variety of other

terms" (Ferro, 1997, p. 4). He made the argument that the term andragogy was an invalid

concept to support adult learners. While making this argument, it was clear in his article

that he did not make any attempt to display or to understand the origin of andragogy.

Reichmann (2004) was critical that the philosophy of andragogy could stand on its

own. Reichmann (2004) criticized Knowles' philosophy of andragogy, arguing that

andragogy only offered a generic, conceptual idea within the field of education.

Reichmann (2004) emphasized that andragogy was an educational trend that was based in

a specific historical concept. "For example, one of Knowles' basic assumptions is that

becoming an adult means becoming self-directed. But other genuine concepts of adult

education do not accept this 'American' type of self-directed lonesome fighter as the

ultimate educational goal" (Reichmann, 2004, para. 10). He suggested that in our

families, classrooms or even in faith-based settings, the concept of 'we' is far more

important than the concept of 'I.' "Similarly an instructor who presents the name of the

stars in a hobby-astronomy class would not work andragogically because it is not

autonomous learning" (Reichmann, 2004, para. 10). Another critique Reichmann (2004)

specified was that Knowles viewed pedagogy as task-oriented and not beneficial for

adults. He specified that Knowles presented opposition toward the concept of pedagogy,

as it was teacher-centered. Reichmann (2004) believed that Knowles' opposition to

pedagogy could potentially lead to two negative outcomes. The first negative outcome

that could occur was that "on a strategic level, scholars of adult education could make no

alliances with colleagues from pedagogy" and secondly, "on a content level, knowledge

developed in pedagogy through 400 years could not be made fruitful for andragogy"

(Reichmann, 2004, para. 10). He strongly stressed that andragogy would be best used as a supplemental methodology of a pedagogical technique.

While there were a handful of theorists and authors that disputed Knowles and his teachings, there were many educators who saw light in Knowles' approach to andragogy, and applied andragogy to their own individual passions. Kabuga (1977), Somers (1988), Henschke (1989), Lai (1995), Lawson (1996), Isenberg (1999, 2007), and Vatcharasirisook (2011) all took Knowles teachings and applied them to their areas of expertise. When combined with the individual passions of various educators, andragogy reached far outside of the academic realm.

Henschke (1989) was another prolific andragogical author, educator, and visionary. He was noted for relating the characteristics of trust, empathy, and sensitivity to the role of adult educators. He was credited for his development of the Instructional Perspectives Inventory (IPI) in 1989. The IPI was a "self-reporting assessment instrument revealing philosophical beliefs as well as personal and contextual identification, actions, and competencies for guiding conduct in adult education" (Henschke, 1994, p. 75). The IPI, or modified versions of the IPI (MIPI), has been used in over 22 dissertations and has been formally validated 3 times.[2]

Kabuga (1977), an African, used andragogy to rebuild a broken social society within eastern Africa, specifically Uganda. He used andragogy as a development tool for both children and adults. His techniques were taught elementary classes in order to allow the students to become self-directed, and assertive learners. Kabuga (1977) considered the techniques of pedagogy to be tyrannical. "It can be illustrated that education in any

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[2] For the full list of dissertations, and validations, please refer to Table 3 in Chapter 3.

society, whether African, European, or any other that employs the techniques of

pedagogy, is oppressive, silencing, and domesticating, among many other ills" (Kabuga,

1977, p. 250). He described African educational roots in pedagogy as "one-way traffic,

glorifying the teacher whose wisdom could not be questioned . . . it oppressed, silenced,

and domesticated the learner" (Kabuga, 1977, p. 250). He asserted the self-concept

image that was created on an individual level varied from person to person, much like

andragogy was to be considered an individual process of learning. Kabuga (1977) argued

that pedagogy was built upon a static foundation whereas "andragogy is premised on a

dynamic culture" (Kabuga, 1977, p. 253). Human beings were capable of moving from

being dependent learners to independent, self-directed learners. Adult learners were

autonomous thinkers capable of making conscious decisions and facing their

consequences. Knowles (1990) noted that no adult learner could ever truly learn under

conditions that were not parallel with his or her self-concept. By using andragogy in

classrooms of elementary schools, Kabuga (1977) allowed his students to develop their

interests and create ways to learn those interests.

        Somers (1988) was another individual who heralded the resourcefulness of

Knowles' variation in adult learning. In Somers' article, "Working with the Adult

Learner: Applied Andragogy for Developmental Programs," in 1988, he broke down each

of Knowles' assumptions so that each could be applied to specific developmental groups.

He asserted that learners of all ages could be self-directed and were capable of

discovering ways to learn. Somers (1988) argued that if children were taught at a young

age a sense of self-concept, then it would allow the maturation process to be a smoother

process. Adult learners generally preferred subjects and content that were relevant to

their immediate problems and needs. Self-directed learners were constantly moving

forward to develop their own sense of self and to find new, and appropriate ways to

quench their thirst for knowledge.

In 1995, Lai, an American author, used Knowles' approach to connect andragogy

to Biblical and spiritual teachings of faith. Lai (1995) articulated that Knowles' variation

of andragogy was a theoretical viewpoint that allowed individuals the freedom to pursue

his or individual interests. Lai (1995) argued that it was the authorities of society that

told people how to behave, but "in the Church this is apparent in those settings where,

'for the good of the flock,' pressure exists, either implicitly or explicitly, to conform to

externally imposed, often extrabiblical behavioral norms and doctrinal standards" (Lai,

1995, p. 6). He argued that "it is no wonder that people grow passive, lethargic, and

irresponsible" when they are not allowed to grow and experience faith from an individual

self-directed level (Lai, 1995, p. 7). Therefore, he or she was not actually growing in

faith at all. All of these variations of Knowles' (1991, 1996, 1998, 2002) theories were

representative of the educational philosophy that any person who was self-directed in

their learning was also a passionate life-long learner.

Lawson (1996), a philosopher from Great Britain, took andragogy in a completely

different direction. Lawson (1996) suggested that Knowles' take on andragogy was

derived from humanitarian theories and principles. He strongly suggested that much of

what Knowles' taught was rooted deeply in basic human rights. Lawson's teachings

supported that andragogy had humanistic characteristics which were not only appropriate

but also absolutely necessary for adult learners to thrive. He emphasized the value of

self-directed learners, self-actualization, and learner-centered environments.

Additionally, Lawson (1996) indicated that to be andragogical was to be open-minded,

self-aware, and free to learn and discover. Lawson's research was valuable to the field of

andragogy because it focused on principles and factors that could have changed the way

people viewed society. While Kabuga (1977) focused on using andragogical

methodology in an elementary school in Eastern Africa, Lawson (1996) intended to use

andragogy to change the social culture that he lived in, and saw andragogy as a way to

better society.

Among various fields of study, andragogy could also be considered a viable

method in the business world as well. Henschke and Cooper (2006) discussed how

andragogy could be applied within organizations by those "who are willing to

intentionally use andragogy as a means for finding out, and learning ascertaining new

things for their growth" (p. 96). Henschke (2009) elaborated:

> Andragogy is defined as a scientific discipline, which deals with problems
>
> relating to HRD [Human Resource Development] and Adult Education and
>
> learning in all of its manifestations and expressions, whether formal or informal,
>
> organized or self-guided, with its scope of research covering the greater part of a
>
> person's life. It is linked with advancing culture and performing, professional
>
> roles and tasks, family responsibilities, social or community functions, and leisure
>
> time use. All of these areas are part of the working domain of the practice of
>
> HRD and Adult Education. It could be said that a clear connection is established
>
> from the research to practice of andragogy, with andragogy being the art and
>
> science of helping adults to learn and the study of HRD and Adult Education
>
> theory, processes, and technology relating to that end. (p. 4)

Learning takes place in every field and in every circumstance; that is inevitable.

Learning is constant. Much of being an adult learner was being self-directed and having

a strong sense of self-concept. Adults study every field from arts to humanities to digital

technology to mathematics in collegiate classrooms and will continue to do so. Knowles

recognized how andragogy could be applied in a corporate environment throughout his

entire career. That could be seen with the collaborations he had with Westinghouse

Corporation and the Girl Scouts (Knowles, 1968b; Knowles, 1990). Every field that

could possibly be studied, could potentially relate to the field of andragogy. Learning did

not halt after those students left colleges and universities. Instead, the knowledge and

experiences gained was brought from those university classrooms to the workplace

environment. It would seem that the most successful of those individuals continued to

learn long after they left colleges and universities. In 1983, Knowles wrote:

> Having been raised in the era of Fredrick Taylor's 'scientific management,' I had
>
> perceived the role of leadership to consist primarily of controlling followers or
>
> subordinates. Effective leaders, I had been taught, were those who were able to
>
> get people to follow their orders. The consequence of this doctrine was, of
>
> course, that the output of the system was limited to the vision and ability of the
>
> leader, and when I realized this fact that I started rethinking the function of
>
> leadership is releasing the energy of the people in the system and managing the
>
> processes for giving that energy direction toward mutually beneficial goals…
>
> Perhaps a better way of saying this is that creative leadership is that form of
>
> leadership which releases the creative energy of the people being led. (Knowles,
>
> 1983, pp. 182-183)

In *Making Things Happen by Releasing the Energy of Others,* Knowles (1990b) discussed how leading others in any atmosphere, whether it be in an academic classroom setting or in a corporate environment, was much more than controlling his or her followers or subordinates. After spending a good portion of his career working with adults in various corporate environments, Knowles (1983) discussed creative leaders and how they managed their employees differently than controlling leaders.

      In 1999 and then again in 2007, Isenberg took andragogy into unchartered waters: the world of internet learning. Isenberg recognized that as technology changed, so had how adults learned outside of the classroom setting. In the book, *Applying Andragogical Principles to Internet Learning,* Isenberg (2007) stated that "adult learners are using computer technology and the internet at an increasing rate to communicate, as well as to get and send information" (p. 3). Isenberg recognized potential andragogical applications to be used in a variety of professional environments. In 1999, Isenberg and Titus explained that transferring andragogical principles to the field of online learning was valid because adults' learning needed changed due to the change of technology. According to Isenberg and Titus (1999):

> The importance of the concerns is threefold: 1) many adults' educational
>
> background has left them ill-equipped to be lifelong learners; 2) failure to learn on
>
> the Internet may lead to frustration, anger and fear of trying again; and 3)
>
> communication research is not able to keep pace with Internet learning practice.
>
> (p.1)

All three of these previous concerns became increasingly relevant as technology changed and evolved. Isenberg (2007) advocated that educators were not always physically

present in the classrooms of adult learners, so it was logical and practical that those who created online learning modules should follow andragogical principles. On the other end of the spectrum, online learning was valued by learners who were self-directed and appreciated the relevancy that online learning provided.

Vatcharasirisook (2011) was a prime example of how andragogy could be used in any field. This author used Knowles' assumptions of adult learners and the principles of andragogy and applied them to the industries of healthcare, hospitality, and banking (Vatcharasirisook, 2011). In the dissertation, *Organizational Learning and Employee Relations: A Focused Study Examining the Role of Relationships between Supervisors and Subordinates,* Vatcharasirisook (2011) examined the relationships that employees had with their supervisors to determine the level of job satisfaction each employee had within their organization. Andragogy was applicable to more than just the classroom. Andragogy was applicable to any field where adults were learning.

From the review of the literature, the field of andragogy made great strides in the century previous to this writing. "Many adults have never learned how to learn because they experienced a traditional childhood education as a passive learning, [where they were] thought of as a vessel to be filled with knowledge" (Isenberg & Titus, 1999, para. 15). While andragogy came and went in waves globally initially, andragogy was here to stay because it transformed not only the educational realm, but also the realm of business, organized faith, ethics, and social development. Andragogy was completely applicable to those who were willing to use it intentionally, and andragogy encouraged learners of all ages to acquire new knowledge by discovering it in an individual manner.

Organizational Development and Learning

In order to thoroughly discuss how Andragogy could be applied in other fields besides academia, it was necessary to discuss both organizational development (OD) and organizational learning in depth. Organizational development, or OD as it was commonly referred to, focused directly on the facilitation of organizational change. Both concepts were closely linked together, and both the concepts played a vital role in the survival and marketability of organizations (Harrington, 1997; Harrington, 2000; Vatcharasirisook, 2011). As companies continued to develop, it was important to recognize that "management paradigms today are experiencing a shift. While cutting costs was an acceptable strategy in stable times, it is no longer suitable in today's dynamic competition" (Yang, Wang, and Niu, 2007, p. 548). In order for organizations to continually compete in a global market, organizations needed to develop core values and its employees' desire to learn. Janetta (2013) discussed the importance of OD to organizational leadership:

> Organizational development is necessary to change attitudes of managers and
> employees within organizations, covering the entire organization and aims to
> improve organizations' capacity to solve problems, to improve organizational
> climate through direct involvement of people in order to increase flexibility
> capacity of adaption to environmental changes and more effective use of
> resources. (p. 1671)

It was OD processes that allowed organizations to become leaner and stronger institutions. The concept of OD focused on change within organizations.

Organizational development processes did not focus merely on one area of organizational change. Organizational development could focus on changes in processes, procedures, finances or socially. The way that employees interacted with each other, and the individual knowledge an employee applied to his or her specific job role were connected to the overall health of the organization. (Twomey, 2002). Expert source Janetta (2013) stated, "For each company to operate at the optimum parameters, we need effective communication and managerial communication that, is increasingly important at the interpersonal level for positive interaction among all levels of management" (p. 1666). Therefore, innovation and the desire to learn fluidly within the organizational setting were needed in order for organizations to thrive in the global market.

Organizational Development

Changes in corporations could bring forth stronger relationships, better financial situations and procedures that benefited the individual employees and the organization as a whole. "Organizational development uses methods and knowledge of behavioral sciences in order to improve human performance, focusing on the full exploitation of human potential in the field of organizational change" (Janetta, 2013, p. 1671). Organizational development was defined a number of times in a variety of ways. It seemed that the definition evolved as the field of OD evolved. "The field of OD has progressed continuously to keep up with the changing milieu" (Ramnarayan & Gupta, 2011, p. 3). Each definition reflected the time period in which it was defined. Experts in the field of OD added their contributions to what he or she interpreted OD to be. For the sake of this literature review, "organizational development (OD) is a systematic and planned approach to improving organizational effectiveness" (Vatcharasirisook, 2011, p.

8). Individuals relied heavily on organizations. "Every aspect of our life is intertwined

with the products and services offered by organizations" (Ramnarayan & Gupta, 2011, p.

3). Individuals looked to organizations for employment, education, transportation,

electricity, healthcare services, and entertainment. "In the process of carrying out their

activities, organizations encounter a wide array of problems" (Ramnarayan & Gupta,

2011, p. 3). Some of these issues included processes of performing daily activities,

managing mediocre team performance, interpersonal conflicts, and low morale issues.

"The pervasiveness of organization in various aspects of our lives highlights their

importance. Organizational development is fundamentally an organization improvement

strategy that utilizes a diverse set of applied behavioral sciences" (Ramnarayan & Gupta,

2011, p. 3). Organizational development optimized specific and measured interventions

within organizations to improve their current state.

Much of OD required specific attention to how groups functioned together, as

well as how those groups impacted the whole organization. Organizational learning

could not be discussed in depth without discussing the theory of OD first. "The roots of

organizational learning are firmly imbedded in the field of organizational behavior and,

more specifically, organization development" (Harrington, 2000). There were various

areas of influence that affected the field of organizational learning, including system

dynamics, educational theories, the social sciences, and OD. Recognizing the

connections between OD and organizational learning, Chiva and Alegre (2009)

developed the Organizational Learning Capability (OLC) which was comprised of five

organizational learning dimensions. Those dimensions were: (a) Experimentation, (b)

Risk taking, (c) Interaction with the external environment, (d) Dialogue, and (e)

Participative decision making.

The OLC served as a measurement tool used to gauge how much learning

occurred within organizations. In 2011, Vatcharasirisook worked to display that the

MIPI and the OLC were connected to each other. Vatcharasirisook (2011) determined

that that the seven factors of the MIPI influenced the five elements of the OLC and

aligned together and promoted learning at the organizational level.

While organizational learning was influenced by a plethora of other fields, OD

played a major role in the development of organizational learning (Bartunek, Austin, &

Seo, 2008; Harrington, 2000; Ramnarayan & Gupta, 2011; Senge, 1990;

Vatcharasirisook, 2011). Harrington (2000) noted that "organization development has

clearly had the most profound impact on the development of organizational learning" (p.

10). While both OD and organizational learning were two completely separate notions,

they functioned together. It was impossible to have one without the other.

The problematic idea to recall about OD was that, while most authors agreed that

it was vital to the growth of an organization, there was a lack of consistency in its

definition and how it was conducted. Organizational Development supported

organizational change by harmonizing goals "with the aims of people working in the

organization, but changing the organizational culture and optimizing organizational

communication on the basis of principles of openness, trust, information sharing,

productivity, organization and work group dynamics, etc." (Janetta, 2013, p. 1665).

Regardless of how authors defined OD, the goal was the same: to improve efficiency and

effectiveness of the organization through change.

Generations of organizational development. Historically speaking, "The emergence of OD in circa 1960 has been a significant development of the 20th century" (Ramnarayan & Gupta, 2011). At the time of this writing, and since the initial formation of OD, there have been three generations of OD. Each generation offered its own contributions to the field of OD.

Even though OD did not start gaining popularity until the 1960s, its roots could be traced back to the 1940s during the first generation. The First Generation of OD dealt with the "adaptive, incremental change in the organizations" (Ramnarayan & Gupta, 2011). There were many people who contributed to the field of OD. Lewin (1946, 1948) was one of the most commonly known contributors. "Kurt Lewin, the founder of social psychology, and one of the European Jewish intellectuals who came to America after the rise of Hitler in Germany, was concerned about authoritarian and power relationships in a society" (Edwards & Willis, 2014, p. 11). Lewin had such an intense impact on OD that his name could be traced back directly and indirectly to all four major stems. The first generation focused on the micro aspects of organizations, such as individuals or small groups. The first generation worked to advance how the organization functioned within a predetermined framework without taking into consideration the organization's past (Bartunek et al., 2008). The stems of OD were constructed during the first generation, and are discussed in depth at a latter part in this dissertation.

While the First Generation of OD dealt specifically with the micro aspects, the Second Generation of OD focused specifically with macro-aspects of organizations "to help them respond effectively to the external needs in terms of competitors, technology and stakeholders, etc." (Ramnarayan & Gupta, 2011). The second generation worked to

develop awareness of how leadership impacted how organizations changed over time (Bartunek et al., 2008). It was the first and second generations that directly impacted how the third generation came to be.

The Third Generation of OD focused on very large-scale transformations that occurred with organizations. The difference between the third generation and the other generations was that the third generation placed its focus specifically on the past transformations (Bartunek et al., 2008). It was the interventions of this generation that built the ideas and successful transitions of what OD could become in the future.

Roots of the tree. While it is unclear as to the exact moment that OD was constructed, there are specific, yet distinct moments referred to as 'stems' that came to fruition during the first generation of OD, which were absolutely crucial to the foundation of OD (French & Bell, 2001; Harrington, 2000; Ramarayan & Gupta, 2011). While there were a number of vital moments which added depth and vivacity to the field of OD, it was the major stems of organizational development that built what was known as OD. The four major stems of OD were: (a) Rise of action research (AR), (b) Usage of National Training Laboratory (NTL)/T-group training, (c) Origination of survey research and feedback, and (d) Advancement of Tavistock's sociotechnical and socioclinical approaches (French & Bell, 2001). Each of these stems played a vital role in the development of organizational learning. Interestingly enough, each of these stems were connected to andragogical processes as well.
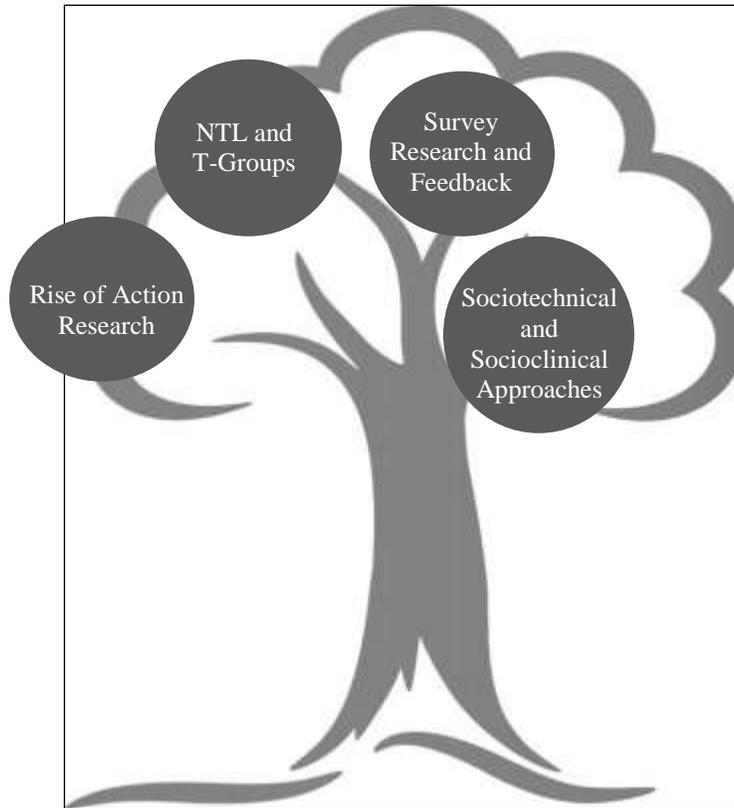
Figure 3. Stems of OD. The information in this graphic can be attributed to French and Bell (2001).

First OD stem — Rise of action research. Lewin (1946, 1948) was responsible for the conceptualization of AR. Had it not been for his personal history, AR may not have ever come to be. "Kurt Lewin was a social thinker who fled Nazi Germany when both his religion and his way of thinking, which included paying attention to the needs of minorities and the oppressed, put his life at risk" (Edwards & Willis, 2014, p 16). Even before moving to the United States, Lewin's work focused on the treatment of minorities throughout society. "His particular concerns appear to have been combating of anti-Semitism, the democratization of society, and the need to improve the position of women" (Smith, 2001, p. 1). It was those major life events that made Lewin support social change. That was reflected in his methodology of AR. "The term action research

was made popular in the late 1940s to describe systematic work in the field to solve a

problem or answer an important question about professional practice" (Edwards & Willis,

2014, pp. 9-10). At its very core, Lewin's version of AR focused on how humans could

better understand their own environment and make better decisions if they would collect

data and properly analyze it. Lewin's (1946) dictum of AR focused on the premise that

an action could not be performed without research and any research should result in

action. Lewin (1948) described AR as

> The research needed for social practice can best be characterized as research for
>
> social management or social engineering. It is a type of action-research, a
>
> comparative research on the conditions and effects of various forms of social
>
> action, and research leading to social action. Research that produces nothing but
>
> books will not suffice. (pp. 202-203)

This quote specifically referenced the two main points that Lewin intended AR to have.

The first was the awareness that changing social practice required participation from all

individuals in the environment, not just one person. The second was that the focus must

have been on action taken by the collective group (Edwards & Willis, 2014). Another

specific detail of AR that made it different than other forms of research was that "action

research was often done by practicing professionals rather than research professionals,

and the reasons for doing it are typically very practical rather than theoretical" (Edwards

& Willis, 2014, p. 4). Action research was intended to be a methodical and scientific

process that allowed data to be collected and used to improve processes. "Action

research is a family of methods for doing research in the field rather than in a laboratory

setting" (Edwards & Willis, 2014, p. 4). In his 1946 paper, Lewin noted that AR was not

intended to be a quick or universal fix to any of the problems faced. However, what he

did recommend was a foundational framework to experiment with the problem and

various solutions (Lewin, 1946, p. 13). In the book, *Organizational Development:*

Accelerating Learning and Transformation, Ramnarayan and Gupta (2011) referred to

the processes of AR as "gathering data; feeding back the data to the client system;

discussing and analyzing the data with client, and jointly devising and executing an

action plan; and evaluating the results to identify new problems" (p. 7). It was Lewin's

intention that the group of people as a whole would work together to develop solutions to

the problem. It was never his intention that each individual would devise a plan that

would not work for the whole group.

    Lewin (1946, 1948) set the foundation for the creation of OD by AR to develop

strong leaders in organizations, so that organizations could capitalize on strong

leadership. He strived to develop strong, democratic managerial styles in individuals

who were involved in organizational leadership. (French & Bell, 2001; Harrington,

2000). In the dissertation, *Organizational Learning: A Theoretical Overview and Case*

Study, Harrington (2000) noted that individuals who displayed democratic managerial

styles were the most effective, while those who displayed autocratic managerial

approaches were not nearly effective in achieving high performance in work groups or

organizations.

    The development of AR was important to the field of OD because it resulted in a

greater understanding of how organizations operated, and more effective resolutions of

common problems. It also offered insight to collective realities and the creation of new

knowledge that could add to organizational theory (D'Souza & Singh, 1998). The development of AR led directly to the second stem in OD.

Second OD stem — National Training Laboratory /T-Group. The second OD stem came as a direct result of Lewin's (1946, 1948) work in AR. In the summer of 1946, he was asked to develop a taskforce to construct a sensitivity training at the request of the Connecticut Interracial Commission (Harrington, 2000; Kleiner, 1996; Ramnarayan & Gupta, 2011). While Lewin's AR studies were fundamental to the development of OD, the moment of conception for OD was generally thought to be inspired at the Connecticut Interracial Commission. Harrington (2000) recalled the story:

> Lewin, at the time a faculty member at MIT, was asked by the State of
> Connecticut's Inter-Racial Commission to conduct a training workshop that would
> help to improve community leadership and interracial relationships of town
> leaders in New Britain. Lewin brought together a group of colleagues and
> students to serve as trainers and researchers that included Leland Bradford,
> Ronald Lippitt, Ken Benne, Morton Deutsch, Murray Horwitz, Arnold Meier, and
> Melvin Seeman for the workshop. The training consisted of lectures, role
> playing, and general group discussions. (pp 13-14)

During the day, these men gathered to work with individuals on specific sections that focused on group dynamics. Burke (1982) recalled that "in the evening, the researchers and trainers met to evaluate the training to the point, discussing participant behavior as they had observed it during the day" (p. 25). It was at this conference that a central moment occurred in the second week during one of the end-of-day briefings. In the book, *The Age of Heretics*, Kleiner (1996) recalled the story:

Four participants, wandering back to their hotel room, passed the open door of

Lewin's room and asked to listen in as the trainers talked over that day's session.

Lewin agreed. Sitting in the comer, one participant - a social worker named Mrs.

Brown - began to recognize herself in Lippitt's description of a participant 'who is

customarily the most backward and hesitant' but who had suddenly become a

'very active and verbal leader' in a role-play, even after the exercise ended. What

did that mean? Was she unconsciously adapting the role-play personality into her

own?

Before a social scientist jumps to a hypothesis, the observations must be verified.

So Lippitt turned to a graduate student named Murray Horwitz, who concurred:

Yes, Mrs. Brown had changed - and then he broke the frame. 'I think she is here,'

he said, 'so why don't we ask her if she noticed it too?' Lippitt agreed, and the

attention of the group turned to Mrs. Brown. 'Are we all off the beam here in our

hunches?' Lippitt asked. (pp. 34-35)

If there was one specific moment that the field of OD was born, this was that moment.

Lewin pieced together the puzzle of OD. It was this moment that Lewin comprehended

the impact of this event, when the participant discussed her view points and perceptions

with the group and responded to the groups' given input (as cited in Kleiner, 1996). The

following evening, Kleiner (1996) discussed that all 50 people who participated in

training sessions were asked to join in the evening debriefing session. This was

important because this was "where participants and leaders played an important role in

analyzing the evolution of the group and the direction of its social interactions"

(Harrington, 2000, p. 14). This was the first moment that people came together to reflect

on what happened during these learning groups. Marrow (1969) articulated that was the same moment that people displayed an electric reaction to the data collected about their own behaviors. While Lewin was the one who brought all of this together, T-groups, or 'training-groups' were developed by Lewin, Benne, Lippitt, and Bradford as a result of these initial sessions (as cited in Harrington, 2000). Something big came out of these training sessions. After this initial group was established, it allowed the leaders to use these training groups for the betterment of students in the region. This session impacted directly and indirectly a number of people who would go on to be guiding forces in a variety of learning fields.

After the initial conference ended, Lewin strongly encouraged the development of a training center that was referred to as a "cultural island" (Weisbord, 1987, p.100). Within merely months of the original session, Lippitt, Benne, and Bradford went on to publish their findings, raise money and met in regular T-group sessions (as cited in Harrington, 2000). While there was a specific location chosen to continue these T-groups, "Lewin died unexpectedly at the age of 47" (Harrington, 2000, p.14). After his death, Lewin's protégées continued the effort that Lewin had passionately started. "His disciples, Benne, Bradford, and Lippett founded NTL and began group-training sessions there in the summer of 1947" (Harrington, 2000, p. 14). After the commencement of the NTL, each of the three founders became significant in his own right. Harrington (2000) addressed each of the three original disciples as such:

Bradford became a leader in Adult Education at the National Education

Association, Lippitt became the Director of Lewin's Institute for Group Dynamics

Research which he later moved from MIT to the University of Michigan, and

Benne became a Professor of Education at Boston University. Interestingly,

Benne provides another key link in the development of organizational learning

theory. Much of organizational learning theory is steeped in experiential learning

and role of inquiry and reflection, of which educator John Dewey was one of the

most well-known proponents. (pp. 14-15)

Lewin and his pupils understood that they were on the verge of something big, but there

was no way to determine whether they understood just how big of an impact they would

have on organizations and OD as a whole. Retrospectively, successes of Lewin and his

disciples led to the future accomplishments of OD.

Third OD stem — Origination of survey research and feedback. While the

first and second stems of OD came directly from Lewin and his disciples, the third OD

stem was traced back to the origination of survey research and feedback. The person

most frequently associated with survey research was Rensis Likert from the University of

Michigan. Likert believed that "drawn from the field of industrial psychology, survey

research and feedback relies on information gleaned from questionnaires for collecting

data, doing assessment, and planning corrective action in organizations" (as cited in

Harrington, 2000, p. 15). While each stem was different, each of the first and second

stems of OD majorly impacted how the third OD stem came to fruition.

Shortly after Lewin's death, "Likert coupled Lewin's Research Center for Group

Dynamics at MIT with Michigan's Survey Research Center to form the Institute for

Social Research" (Harrington, 2000, p. 15). As a result of this unique pairing, the two

groups were able to combine group dynamics with questionnaire surveys to assess

employees in organizations. First of all, the survey itself was very useful for collecting

data from employees regarding the organization or the management (Burke, 1982).

Secondly, all of the information was reported back to the employees and the organization

(Harrington, 2000). Thirdly, ideally, the management and employees worked together to

develop a fuller understanding of the information, and worked together to develop plans

to improve the organization (Burke, 1982). As a result of these three factors,

organizations were able to utilize survey feedback as it was intended.

While developing the survey feedback methodology, Likert worked closely with

Mann within the Detroit Edison Company (Harrington, 2000). Mann was often credited

with the refinement of the process of survey feedback. "In the years that followed, Likert

created a diagnostic model for organizations that utilized Mann's process of survey

feedback" (Harrington, 2000, p. 16). Weisbord (1987) espoused that organizations that

embraced an employee-centered, high involvement, and participative model of leading

people were viewed as a having a stronger framework that could truly attain successful

business results.

All three of these initial stems of OD directly impacted the fourth stem. Without

the previous three stems, the fourth stem would not be what it would become. The

combination of all of the stems together allowed for others to change and develop their

own contributions in the future.

Fourth OD stem — Tavistock's sociotechnical and socioclinical approaches.

Even though Lewin passed, his impact of the research that he and his protégées'

performed was still felt by others. In the 1950s, Tavistock Clinic experimented with

Lewin's theories to provide support to families and organizations (French & Bell, 2001).

Tavistock Clinic was located in the United Kingdom and was under the leadership of

Wilfred Bion and John Rickman (French & Bell, 2001). In Tavistock, Bion and Rickman

worked to make processes used by the workers of the coal mines more effective and

autonomous by increasing the technology that was used.

The greatest outcome to this experimentation was the "development of

Sociotechnical systems' approach to restricting work" (Ramnarayan & Gupta, 2011, p.

8). The Sociotechnical approach directly focused on employees in non-executive roles

and how to redesign work in organizations. "It takes into account the entire system and

frequently rearranges roles/tasks/sequence of activities to minimize alienation and

facilitate social relationships among employees" (Ramnarayan & Gupta, 2011, p. 8).

Trist (1978) saw how effective and autonomous the miners in the coal mines had become

with the usage of the new technologies. Being the visionary that he was, Trist viewed

this as an opportunity to become more efficient in different areas as well. He analyzed

issues that the miners faced frequently. Because of the Sociotechnical Approaches, Trist

was able to resolve issues in the coal mines by using strategies developed for small

groups and autonomous individuals.

Trist (1981) experimented with organizational redesign work and the usage of

semi-autonomous work groups. His experimentation with small work groups revealed a

positive effect of social relationships and the use of autonomy among workers regarding

productivity (D'Souza & Singh, 1998). Trist was one of the first to include technology

into the processes were used by the workers. He was a visionary who was able to view

solutions and how they would impact the bigger picture. Because of Trist's research,

more connections were made between the field of andragogy and OD.

Without these four initial stems of OD, the field may not have grown into what it became. Those four major events led to what is considered OD, at the time of this writing. Each barrier and triumph that came from these four stems happened naturally: each stem was built upon the next. Because of the stems, OD impacted the way that leaders, employees and organizations thought about change, innovation, and organizational learning. All four of the OD stems changed how OD was interpreted by others. The combination of all four of them allowed for change and modernization in the future. These four stems shaped how organizations developed processes that impacted their bottom lines. These four stems allowed organizations to look at every aspect of their corporation in order to develop strategies that would ensure success in the future. It allowed room for other people to add their contributions to the field without taking away from what others had left.

Beckard and OD strategies and models. Beckard (1969) was another visionary who was able to see how the field developed. He saw OD as a tool that could continue to inspire individuals in leadership roles for generations. In Beckard's (1969) book, *Organizational Development: Strategies and Models,* OD was categorized into five main strategies. First, OD concentrated on how planned change efforts could be a strategy used in making corporations more efficient. Second, OD involved the whole system or organization working collectively together rather than several individuals working by themselves. Third, OD brought change that was managed from the top down to the bottom. In order to expect organizations to shift and adjust, it all started with leadership. Once the leadership bought in to the changes made, the employees would as well. Fourth, OD was designed to increase organizational effectiveness and organizational

health. Finally, OD used the knowledge gained from behavioral-science and

interventions to achieve its goals of making processes for organizations as lean and

financially efficient as possible. Beckard (1969) asserted that by the usage of such

operational strategies as the backbone of OD, organizations moved towards high

collaboration between the entity and its employees, as well towards the development of

mechanisms that allowed the facility to constantly progress forward (Beckard, 1969).

When employees collaborated with each other on a frequent basis, they were able to

make conscious decisions that were metric-based and continuously improved processes

and procedures.

Phases of OD

In organizational development, there is a cycle of phases intended for continuous

improvement of the organization. According to Burke (1994), the cycle of OD consisted

of seven distinct phases. Those phases were: (a) Entry, (b) Contracting, (c) Diagnosis,

(d) Feedback, (e) Planning Change, (f) Intervention, and (g) Evaluation.

Entry: This "refers to the preliminary contact between client and consultant after

the client has perceived some problem in his or her setting" (Ramnarayan & Gupta, 2011,

p. 13). This phase provided an opportunity to examine the situation with all parties

involved before initiating the cycle of OD.

Contracting: Once the client and the consultant had discussed the problem and

possible solutions, the two entered into a contractual relationship. Ideally, both parties

drafted a contract stating the terms and responsibilities of each party.

Diagnosis: This phase attempted to accurately articulate the problem after

addressing the current state of the organization. "Diagnosis can be subsequently divided

into two stages — data gathering and data analysis" (Ramnarayan & Gupta, 2011, p. 14).

By accurately diagnosing a problem, the organization was able to use the data gathered to

fix the problem and to prevent similar future issues.

     Feedback: "Feedback emerged with the success of the T-groups where every

participant received feedback from group members at the end of the session"

(Ramnarayan & Gupta, 2011, p. 14). Feedback was representative of the process of

giving back the data to the client in the most useful way. Feedback allowed organizations

to receive, examine, and assimilate new information before proceeding to the next phase

of OD.

     Planning change: The main purpose of this phase was to generate and analyze a

variety of alternative solutions in order to decide upon an appropriate intervention.

"Planning change involves the client in collaboration with the consultant to chart out an

action plan on the basis of information s/he has received during the feedback"

(Ramnarayan & Gupta, 2011, p. 15). By planning for change, it allowed organizations

the opportunity to overcome and prevent potential shortcomings.

     Intervention: "Action takes place through intervention (Ramnarayan & Gupta,

2011, p. 15). Interventions were strategic, structured patterns of activities that related

directly or indirectly to organizational improvement (French & Bell, 2001). It was during

this phase that all goals were carried out.

     Evaluation: After the intervention was performed, the results were evaluated to

assess which pieces of the intervention were successful and which parts could have been

improved. "If changes are not congruent with the results projected at the outset, the

entire cycle is repeated" (Ramnarayan & Gupta, 2011, p. 15). This phase also worked to

assess the inadvertent consequences.

      Organizational change models. Since the beginning of the 19th century, models

have been used in various organizations to guide OD. These models were developed

because "a sound organizational structure provides the foundation essential for

mobilizing support and developing fiscal resources" (Whitehead & Ady, 1989, p. 8).

When companies had a stable financial system already in place, resources were more

easily available. "Organizational change models may be used to assist in reorganizing

and/or restructuring a company, which is being transformed" (Benjamin, Naimi, &

Lopez, 2012, p. 1). Most OD models were primarily influenced by process change or

change in implantation approaches. "Various change models have been proposed to

guide the core purpose of the field of organizational development (OD) — to plan and

implement change in order to promote organizational effectiveness" (Asumeng & Osae-

Larbi, 2015, p. 29). These models were not intended to provide a solution to every

situation that may occur in the real world; they are intended to aid with "designing,

planning and implementing change" (Asumeng, & Osae-Larbi, 2015, p. 29).

Theoretically, organizational change approaches were based on two core theories: change

process theory and implementation theory (Austin & Bartunek, 2003). The change

process theory focused on the dynamics of how and why change transpired. The

implantation theory addressed how peoples' actions generated change in groups and what

actions should be taken in order to facilitate change within an organization (Austin &

Bartunek, 2003). Models of OD were intended to be individual models that were

facilitated by various assumptions (Austin & Bartunek, 2003). Each model that was

developed in OD was developed with a specific issue or problem in mind, and was different from the next. Each model was intended to be used differently. As each corporation was a different entity, each model would not necessarily be a valid strategy for each corporation. Each corporation needed to carefully and thoughtfully examine which model would be best suited for that individual organization.

Contemporary OD Studies. Because OD was so incredibly adaptive, it did not function the same way from one organization to another and was consistently changing. In order to meet the needs of any organization in a changing global market, it was absolutely crucial to be flexible when it came to OD. Each organization was different than the next. There was no one specific strategy or mold that needed to be used to ensure that organizations were changing, growing and learning. Each corporation needed to find a balance that best suited their organization. The more knowledge gathered about OD, the more questions arose in the process.

Faucheux, Amado, and Laurent's (1982) article focused on how OD led to a quality work environment the question. It researched the way in which OD was portrayed and implemented differently across the globe. Faucheux et al. (1982) researched planned change in the United States versus Europe. They researched how OD was different in Latin countries verses the United States or in Europe. The biggest contribution that Faucheux et al. (1982) identified was that "strategies for organizational change cannot be analyzed without proper consideration for their sociocultural and socioeconomic context" (p. 365). They concluded that, while there were some distinct differences in technique due to the culture of each individual country, the basic foundations were similar. Regardless of where the organization was located or what field

the corporation was in, organizations still maintained the same goal to develop their

businesses and to allowed their employees to succeed. What Faucheux et al. (1982)

found was that to determine the organization's specific and individual issues, one needed

to examine the culture surrounding the corporations. It was unlikely to have one thriving

corporation while the environment surrounding it collapsed.

One of the first studies to focus on how OD impacted economic societies was

researched by Hage and Finsterbusch (1987). They recognized the need for OD in

facilities in Third World countries. Hage and Finsterbusch (1987) noted that if

knowledge could "be adapted to enhance the performance of Third World development

agencies, the payoffs could include increased quality of life for millions of people as well

as more understanding of organizational change processes and their societal

consequences" (p. 655). The authors' goal behind this study was to explore if and how

organizations and the economy could be improved by the usage of OD. While attempting

to implement their strategies, the authors found many barriers within their study. Some

of these barriers consisted of societal problems of power, fear, and a scarcity of

resources. Organizational development potentially could be an amazing tool to be used

by organizations all over the globe, but a lack of resources made for difficult barriers to

overcome. Third World countries operated on less resources because they had to. They

lacked financial, technological, and educated employees to create and develop the means

that more developed countries had. Third World countries were more likely to focus on

daily survival on an individual level rather than the organizational level, because they

literally were competing with life or death situations daily. More developed, advanced

nations did not have to be concerned, necessarily, with the individual survival of its

employees, so leaders within these organizations concentrated their attention on making

processes within the organization flow more smoothly.

In 1989, Whitehead and Ady took a different approach to OD. They examined

whether being in the private or public sector played a role in how well the organization

was able to adapt to change. Whitehead and Ady (1989) wanted to determine whether it

was possible to construct similar organizational similarities and differences in both the

private and public sectors in order to build an effective economic environment for a

community. The processes that one may have in place may be similar, but different. Or

the processes in place could be completely different. An example of this would be the

healthcare market in the St. Louis metropolitan area. There were a few large systems,

and there were a few smaller independent hospitals. Although it would be wonderful to

have a set standard of care in healthcare facilities, that was not always the case. How

each entity provided cared for their patients varied depending on the external location of

the facility, the population that the health care facility served, and the amount of

resources that each facility had to work with. In 1989, Whitehead and Ady looked at how

each facility used the field of OD differently. In their study, it was determined that OD

and organizational structure were key elements in achieving economic success, yet no

specific model was suitable for all communities.

Process change and implementation are not always immediate processes. From

time to time, it takes a great deal of time and energy from multiple parties. Gade and

Perry (2003) developed a "longitudinal case study of change at the St. Louis Post-

Dispatch" (p. 327). This case study measured the perceptions of OD of the employees in

the newsroom, viewpoints on newsroom restructuring, and perceptions of public

journalism under a specific editor (Gade & Perry, 2003). The entire study took place

over the course of four years. In the study, participants failed to see a connection

between attempted initiatives and the production of a more influential newspaper. They

found that journalists did not experience individual empowerment that were commonly

associated with team-based systems (Gade & Perry, 2003). In their study, Gade and

Perry (2003) showed how some organizations did not want to change. In order for

organizations to be able to adapt, they had to embrace change. The leaders in the

organization had to be flexible enough to desire change.

In 2012, Benjamin et al. (2012) took OD to a different level. They used OD

strategies specifically with programs that were designated for Human Resources.

Benjamin et al. (2012) wanted to determine which of the OD models would best aid a

human resource practitioner in his or her organizational change strategies. "In order to

manage a successful change, one must be able to compare and contrast each model to

determine which one is best in a certain situation" (Benjamin et al., 2012, p. 1). While

the authors explored a number of various models, they did not determine that one was

necessarily better than another. Benjamin et al. (2012) also determined that there were

many models useful to human resource divisions within organizations.

After reviewing several issues in her organization, Janetta (2013) discussed how

to determine and implement radical changes in order to cope with an organizational fear

of uncertainty. She also developed this study to best assess the knowledge within her

organization to gain a competitive advantage in her field. Janetta (2013) developed a

detailed analysis of her organization according to Greiner's model of development. The

five phases of development focused on: "creativity, leadership, delegation, coordination

and collaboration" (Janetta, 2013, p. 1666). In her study, Janetta (2013) created a

questionnaire that had 60 descriptive statements. She requested that this questionnaire be

answered by four of the organization's leaders and 56 employees with executive

positions. "Following the results obtained from the questionnaires, it had been showed

that the organization is in a phase two of development that is leadership development"

(Janetta, 2013, p. 1666). Because of this study, Janetta (2013) determined that

developing a leadership course for those in leadership roles or executive roles could be

the best form of an intervention.

      Because OD was an evolving field, the theories and models were ever-changing

and evolving. One of the strengths of OD was the ability to be flexible and adaptable. It

had the opportunity to build support in a plethora of fields. In 2013, Haeseler researched

how the field of OD could possibly provide support, and benefit specific service agencies

that served a protected population: abused women. In this article, Haeseler (2013)

explained how specific system-based structures could possibly enhance the care provided

for women who were domestic abuse survivors. If every specific organization that

participated in this study could generate ideas and suggestions to be used to care for the

domestic abuse survivors, the leaders from within the organization could use those

suggestions to develop possible solutions to issues. Haeseler (2013) developed a

qualitative study that collected interviews with eight leaders of four different agencies.

This study was both valuable and insightful, because it allowed separate agencies to come

together and collaborate, while developing solutions for common issues. The results

indicated that system-based structures were the most advantageous organizational designs

that could have been used to support abused women. Haeseler (2013) also determined

that system-based organizational structures were valuable because it allowed for the

complex, individualized and multifaceted care that each woman required.

Asumeng and Osae-Larbi (2015) focused their entire article on a number of

contemporary models used in the field of OD. This review addressed the characteristics,

similarities, and differences of four distinct organizational models. The models that this

article presented were Lewin's three-stage model, the AR model, the appreciative inquiry

model, and the general model of planned change. In the article, *Organization*

Development Models: A Critical Review and Implications for Creating Learning

Organizations, Asumeng and Osae-Larbi (2015) made the connection between popular

OD models and organizational learning. They also addressed the distinct need for change

and adaptability throughout organizations. (Asumeng & Osae-Larbi, 2015). As they

discussed the models, they also specifically noted that organizations were capable of

adapting and changing; they built true learning organizations.

As OD continued to become more recognizable, it would continue to become

even more popular. While the field of OD was a relatively new field, it lacked in

complexity and in intervention strategies. The major finding after completing the review

was that there would always be more than one way to provide support and innovation to

organizations. While there were a variety of strategies or models, there was not a correct

or incorrect answer. Each organization was different and needed to be considered in a

thoughtful and individual manner in order to improve processes. In order to understand

or change an organization, a researcher or change agent must first examine the linkages

between underlying values, organizational structures, and individual meaning (Denison &

Spreitzer, 1991, p. 2). There was "parallel conceptual structure across multiple levels

[that] provides a simple means to discuss individual and organizational change simultaneously" (Denison & Spreitzer, p. 13). As the field of OD continued to evolve, nobody knew what fields it may eventually touch in the future. Where organizations restructured, shifted, and changed, adults learned. Mulili and Wong (2011) concluded that any OD intervention or strategies led to organizational learning on some level or another. Not all organizations became a learning organization as a result of OD, but employees and leaders gained knowledge, insight, new skills, and habits (Mulili & Wong, 2011). Regardless of how OD shifted organizations, there was one absolute. As OD became more of a recognized force in companies throughout the world, organizational learning followed.

Organizational Learning

Organizational learning refers to the process of creating, retaining, and transferring of knowledge within businesses by individuals. In corporations, the knowledge transferred from individual to individual throughout the organization became an important resource that was needed in order to sustain a competitive advantage (Drucker, 1992; Inkpen & Crossan, 1995; McLean, 2006, Vatcharasirisook, 2011). In order to prepare employees to lead business entities in the future, as well as to allow their organization to prosper, organizational learning is a necessity. As mentioned in the OD section of this writing, so much of OD and organizational learning coincided with each other, one did not exist without the other. In order for any entity, large or small, to be legitimately capable of progress, they had to be continuously learning and flexible enough to embrace change.

The topic of organizational learning presented two very interesting dilemmas. The first of the dilemmas was that "although there exists widespread acceptance of the notion of organizational learning and its importance to strategic performance, [there is] no theory or model of organizational learning is widely accepted" (Fiol & Lyles, 1985, p 803). Much like the field of OD, definitions of organizational learning varied from author to author and from literature to literature (Bontis, Crossan, & Hulland, 2002; Fiol & Lyles, 1985; Garvin, 1994; Harrington, 2000; Kim, D., 1993; Simon, 1969; Shrivastava, 1983; Vatcharasirisook, 2011). Simon (1969) defined organizational learning as the consistent, thoughtful insights and successful restructurings of problems within organizations by the individuals employed by those organizations. Fiol and Lyles (1985) proclaimed, "Organizational learning refers to the process of improving actions through better knowledge and understanding" (p. 803). Stata (1989) argued that "organizational learning is a principle process by which management innovation occurs" (p.64). D. Kim (1993) asserted that "an organization learns through its individual members and, therefore, is affected either directly or indirectly by individual learning" (p. 41). Garvin (1994) defined organizational learning as the progression that unfolded over a period of time and was connected with knowledge acquisition and heightened individual performance. Harrington (2000) defined organizational learning as learning for a collective purpose that was developed through experience and personal reflection, was shared by a significant number of people, and used to change organizational processes. Sun (2003) generally defined organizational learning as "the learning process of an organization and by the organization in a collective way" (p. 156). Therefore, regardless of how organizational learning fit the needs of organizations, there was no absolute

definition. Many of the definitions were very similar. For the sake of this dissertation, I

chose to use Garvin's (1994) definition of organizational learning.

The second of the dilemmas was caused as a result of the first dilemma. Because

there was no absolute definition, the roots of organizational learning were not traced

directly to one person or particular academic discipline. Harrington (2000) suggested

that organizational learning "derives from many origins including the social sciences,

education, management and organizational theory" (p. 10). Because of this dilemma, it

was challenging for me to piece together a sorted history of organizational learning.

Chronological timeline of organizational learning concepts and theories.

Organizational learning was a compilation of influences from many people over years. In

order to paint a complete portrait of organizational learning, I developed a timeline to

display the most significant theoretical influences on the subject of organizational

learning. Kleiner (1999) compiled a majority of this information for Fast Car Company

in order to display the most significant theoretical influences on the subject of

organizational learning. This timeline is demonstrated in Table 1. Each of the

contributors offered something significant to organizational learning that would allow for

progression in the future.

Organizational learning has grown tremendously since it was initially recognized.

All of these events pushed the concept of organizational learning to a place it had never

been before. As the world and global market, it will only continue to change. As nobody

knew what the future would hold, it was difficult to predict in what direction

organizational learning would go in the future.

Table 1

Timeline of Organizational Learning Concepts and Theories

1938: John Dewey publicized his book "Experience and Education." This focused on the concept of experimental learning as an ongoing form of action learning.
1940s: The Macy Conferences brought awareness of "systems thinking" a large group of cross-disciplinary individuals including Margaret Mead, Gregory Bateson, and Lawrence Kubie.
1940s: Kenneth Craik developed the term "mental models" which would later be brought to MIT by Marvin Minsky and Seymour Papert.
1946: Kurt Lewin, founding father of National Training Laboratories, developed the concept of "creative tension" which was the frame of mind between an individual's personal vision and a sense of reality.
1956: Edgar Schein researched brainwashing in North Korea and paved the way for developing an understanding of "process consultation."
1960: Douglas McGregor published his book "The Human Side of Enterprise."
1961: Jay Forrester published his book "Industrial Dynamics." This book was the first major application of how system dynamics should operate in corporations. It described the trial and tribulations that occur within a typical corporation.
1970: Chris Argyris and Donald Schon began working on "action science," which is the study of how promoted values clashed with the values that motivated real actions.
1971-1979: A major attitude shift occurred during the Erhard Seminars Training (EST.)
1979: Charlie Keifer, Peter Senge and Robert Fritz designed the "Leadership and Mastery" Seminar, which sets the foundation for their consulting firm, Innovation Associates.
1984-1985: Pierre Wack took a sabbatical at Harvard Business School and wrote two articles about scenario planning.
1982: Senge, Arie de Geus, Bill O'Brien, Ray Stata, and other executive leaders formed a learning organization study group at MIT.
1987: Stewart Brand, Jay Ogilvy, Peter Schwartz and Lawrence Wilkinson formed the Global Business Network and work to encourage organizational learning through scenario planning.
1989: Bill Isaacs, David Bohm, and Senge work together to develop the concept of dialog as a theory for building team capability.
1989: Charles Handy published "The Age of Unreason".
1990: Peter Senge published "The Fifth Discipline." This book was a compilation of many different influences which included: system dynamics, "personal mastery," mental models, shared vision, and team learning.
1990: Daniel Kim created a newsletter called "Systems Thinker" that was parallel to issues relayed in the "the Fifth Discipline"
1991: Pegasus Communications launched an annual conference series entitled "Systems Thinking in Action"
1993: David Garvin wrote an article on organizational learning in the Harvard Business Review. This was important because it argued that organizational learning can only be useful to managers.
1994: The Center for Organizational Learning developed a course called "Learning Histories".
1995: The Organizational Learning Center started the building of an international consortium called the Society of Organizational Learning, and chose Peter Senge as the chairperson.
1996: Art Kleiner published "The Age of Heretics".
1996: Joseph Jaworksi published "Synchronicity: The Inner Path of Leadership".
1997: Arie de Geus published "The Living Company".
1999: Senge published the "The Dance of Change.

Note. (Kleiner, 1999).

Even before the coining of the term 'organizational learning,' adults were learning everywhere, especially within the workplace setting. Adults always had learned in their workplace environments, regardless of whether there was an actual title to what was occurring. Learning not only serves a collective purpose, but is developed through both experience and reflection. Learning is also shared by those in the organization and used to conduct and modify organizational practices (Harrington, 1997). As organizations shifted and evolved through time, organizational learning changed as well. "In all instances the assumption that learning will improve future performance exists" (Fiol & Lyles, 1985, p. 803). The more companies changed, the more learning continued to develop and shift. This allowed for businesses to become leaner fiscally as well as in how processes were used.

The human side of organizational learning. In order for businesses to be adept enough to handle a changing corporate environment, employees needed to be continuously learning and reflecting on processes that were used within that facility. Innovative individuals helped build companies that were stronger both economically and procedurally. As entities adapted to sustain their competitive advantage, individuals were constantly gaining knowledge (Drucker, 1992; Fiols & Lyles, 1985; Harrington, 2000; Inkpen & Crossan, 1995; McLean, 2006). Johnson (2006) made the analogy that conducting business was a game that required both skill and luck in order to accomplish long term goals.

It was also important to note that while individual learning was imperative to entities, organizational learning "is not simply the sum of each member's learning" (Fiols & Lyles, 1985, p. 804). Unlike andragogy, where adult learners functioned

autonomously, business entities created and maintained learning systems that were not

always influential to their immediate employees (or learners) but were transferred to

others through facility histories and set standards (Hedberg, 1981; Martin, 1982; Mitroff

& Kilmann, 1976; Lawrence & Dyer, 1983). Hedberg (1981) noted:

> Although organizational learning occurs through individuals, it would be a
>
> mistake to conclude that organizational learning is nothing but the cumulative
>
> result of their members' learning. Organizations do not have brains, but they
>
> have cognitive systems and memories. As individuals develop their personalities,
>
> personal habits, and beliefs over time, organizations develop world views and
>
> ideologies. Members come and go, and leadership changes, but organizations'
>
> memories preserve certain behaviors, mental maps, norms, and values over time.
>
> (p. 8)

When companies supported the education and knowledge of their employees or learners,

individual people were able to bring practical strategies and solutions to the problems

faced. Building a culture of learning within organizations allowed companies to viably

strategize future endeavors of the company. Organizational learning allowed for the

memory and behaviors of the past to be transmitted into the policies and procedures of

the future. Without organizational learning, OD does not happen. Companies need

individuals learning collectively throughout the organizations so that the organization as

a whole can move forward.

McGregor and "The Human Side of Enterprise". As Lewin's (1946, 1948)

contributions set the precedent in OD, McGregor's (1960) contributions significantly set

the precedent for the field of organizational learning. McGregor's research influenced

how modern organizations functioned. After moving to Massachusetts Institute of

Technology (MIT) from Harvard, he helped found the Industrial Relations division at

Harvard. While he was at MIT, McGregor recruited many people who were influential in

the field of OD (Weisbord, 1987). Some of those people included Beckard (1969),

Bennis (1984), Scalon, and Schein (Weisbord, 1987; Harrington, 2000). McGregor

worked directly with Lewin to establish a training research center in 1947 (Weisbord,

1987, p. 109). Much of Lewin's work led to the techniques used at the time of this

writing in many organizations.

McGregor published *The Human Side of Enterprise* in 1960. In this book,

McGregor presented his famous managerial view known as Theory X vs. Theory Y

(McGregor, 1960). According to McGregor, Theory X manager saw employees as

corrupt, and opposed to work, "therefore saw the role of management as being focused on

the need for control, driven by presentiment of distrust for the workers" (as cited in

Harrington, 2000). McGregor (1960) asserted that this view of employees was inherently

flawed. He argued that this was a result of traditional organizational management

approaches and inhumane treatment of employees. McGregor's beliefs regarding

employees were andragogical; adults as a whole were motivated, interested in self and

professional growth, and self-directed. In this philosophy, Theory X focused on the

manager who did not trust his or her employees, while Theory Y took the approach that

management welcomed and encouraged the reconfiguration of organizations to embrace

and support employees who were motivated, attentive, and autonomous (Bernstein, 1997;

Harrington, 2000; McGregor, 1960). Without knowing it, McGregor embraced

andragogical principles that supported the individual employees at their best. "McGregor

urged managers to accept this more positive approach to their assumptions about the

nature of people, believing that such a view would more likely achieve worker

commitment." (Harrington, 2000, p. 17). McGregor was an avid supporter for

organizational learning. Eric Trist, a leader in the field of OD, wrote a letter about

McGregor to Weisbord:

> He was very keen on organizational learning and that you have to learn, the
>
> organization has to learn and so do the people in it, to keep up with the times. It
>
> wasn't a sentimental concept. It was a bedrock concept, that a human being is a
>
> learning individual, and when he wasn't allowed to go on learning he was
>
> dehumanized. (as cited in Weisbord, 1987, p. 116)

McGregor displayed great foresight and worked to create andragogical atmospheres with

the workplace that encouraged collaboration, discussion, and creativity for all. When

employees displayed ownership of a piece of their own learning inside or outside of the

workplace environment, employees were more committed and dedicated to their

organization.

Influence of systems thinking. Around the same time as McGregor (1960)

pioneered the concept of Theory X vs. Theory Y, Forrester (1961) pioneered a movement

focused around system dynamics. He was a leading contributor in the technologies that

allowed changes in workflows. In the 1950s, Forrester was developing some of the first

digital computers (Harrington, 2000; Kleiner, 1996). In the mid-1950s, he applied

system theories that he developed in the field of engineering to the field of manufacturing

(Forrester, 1961). In *Industrial Dynamics*, Forrester (1961) focused directly on the

systematic patterns that corporations used. It was the influence of systems thinking that

paved the way for the Quality of Work-life movement and also, later on, learning

organizations.

Quality of work-life movement. As sensitivity training began to take place in the

United States, other professionals were simultaneously taking similar approaches in the

United Kingdom. This work was referred to as Sociotechnical Work Design.

Sociotechnical Work Design focused on how industries used technology to improve

process effectiveness and efficiency. "Eric Trist and Ken Banforth of the Tavistock

Institute developed this field through their work with the UK's coal mining industry"

(Harrington, 2000, p. 19). Trist and Banforth were often credited with reevaluating the

usage of technology in the coal mining industry so that processes could be refined. Trist

and Banforth developed an approach which examined the social and technical systems

used by organizations when considering organizational re-designing. Because of this

research, there were major changes made within the coal mining industry "which

profoundly and ironically adversely impacted productivity" (Harrington, 2000, p. 19). As

new technologies were introduced to the coal mining industries, job specialization and

group work were eliminated (Trist, 1981). Trist and Banforth developed an approach that

incorporated the new technology and retained some of the previously established social

structure that had served the coal miners well previously.

As a result of the sociotechnical systems developed, a movement referred to as

quality-of-work-life, or QWL, was initiated. QWL was a movement that developed a

sense of harmony and generated employee job satisfaction through the usage of evidence-

based technology in the coal mining industry. According to Harrington (2000), the

improved technology added to the industrial field, group productivity, and worker

autonomy increased. "QWL included elements of work re-design including job

enlargement and job enrichment" (Harrington, 2000, p. 19). It was emphasized by

Bernstein (1997) that the QWL movement gained tremendous strength in Europe,

particularly in the Scandinavian countries. Bernstein (1997) noted QWL programs

"embraced a chance to develop one's capacity, and offered an opportunity to advance.

Additionally, it conferred [to employees] more control over work, and had both a

collaborative management style and environment of open communication" (p. 222).

While the QWL did have its benefits, it also had it flaws. Technology was constantly

advancing. When organizations used evidence-based improved technologies in the

workplace, it lightened the work load of the employees. While adding improved

technology to the coal mining industry did improve the autonomy of the employees, it led

to the assumption that employees had less reason to trust and rely upon each other.

The QWL movement was an important piece of the organizational learning

history because technology would continue to improve in the future, and organizations

needed to adapt to changing technologies if they were going to continue to strategize

futuristically Also, changes in technology changed how workers performed their job

roles. This was true in any field, whether it is academia, banking, engineering or even

healthcare. Technology changed the way job roles were performed regularly. As a result

of this, the standards changed in organizations as well. As facility standards changed,

organizations needed to provide additional support to small groups within the

establishment.

Argyris and Schon: Espoused Theory versus Theory-In-Use. If it had not been

for the McGregor's (1960) educational theories and the advancement of QWL, the

research of Argyris and Schon (1978) would not have developed. Argyris was a

professor at Yale University, and became affiliated with the field of OD in the late 1960s

and early 1970s (Harrington, 2000, p. 20). In the latter part of the 1960s, Argyris studied

"operationalizing organization change in behavioral terms related to McGregor's Theory

Y model" (Harrington, 2000, p. 20). *Management and Organizational Development: The*

Path XA to YB was published by Argyris in 1971. In this book, he elaborated on the

mannerisms and behaviors of managers who had Theory X or Theory Y assumptions of

their employees (Argyris, 1971). In the book, *Management and Organizational*

Development: The Path from XA to YB, Argyris (1971) also described how managers who

had Theory X assumptions could transition into a Theory Y frame of mind. As there are

no two individuals that are exactly the same, Argyris (1971, 1990, 1991, 1994) advocated

that, in order to successfully integrate individuals into small groups, there needed to be a

balance of strengths and weaknesses brought to the group by the individuals. The

knowledge brought forth by this research was valuable because this was the first process

thought that focused specifically on how managers and those in leadership roles were

taught to adapt their leadership styles around the employees in their teams.

Argyris teamed up with Schon to cultivate a new approach to professional

education and leadership consultation in the 1970s (Harrington, 2000). Argyris

researched the learning insufficiencies of professionals such as architects, psychiatrists,

and educators (as cited in Harrington, 2000; Kleiner, 1996). Meanwhile, Schon (1983)

was working on *The Reflective Practitioner* which studied professionals who were

experts in their chosen fields and practiced reflection in their careers. Schon perceived

Argyris to be one of these individuals, and their research began (Harrington, 2000;

Kleiner, 1996). Together, Argyris and Schon (1978) developed the 'theory-of-action perspective' and this theory led to the publication of *Organizational Learning: A Theory of Action Perspective*. "Their theory-of-action has become the cornerstone for the study of organizational learning" (Harrington, 2000, p. 20-21). In Argyris' and Schon's (1978) book, *Organizational Learning: A Theory of Action Perspective,* Argyris and Schon's (1978) focused on the "notion of 'espoused theory', or what individuals claimed to be their theory of action vs. 'theory-in-use' or where the underlying assumptions and theories of an individual or group which in fact drove their action" (as cited in Harrington, 2000, p. 21). Their research was instrumental to the field of Organizational Learning. Because of their research in theory-of-action, other philosophies in both Adult Education and Organizational Learning were able to emerge.

Senge and the learning organization. Much like his predecessors, Senge (1990, 1994) used the knowledge gained from the individuals before him and played an active role in organizational learning. As cited in Harrington (2000), Senge was a protégé of Forrester (1961), and worked to bridge the gaps between what Argyris and Schon (1978) described as organizational learning and Forrester's system dynamics theory. In 1990, Senge published *The Fifth Discipline,* which implemented problem solving methods by using the systems thinking theory to convert companies into learning organizations. Harrington (2000) stated that *The Fifth Discipline,* "perhaps more than any other single work, has popularized both the concept and the potential of organizational learning" (p. 22). Senge (1990, 1994) saw a need within companies, and used his previous knowledge to develop learning organizations.

A learning organization was a relatively modern concept that has had a major

impact on how organizations function (DeVito, 1996). A learning organization was

defined as an organization where people consistently developed their capability in order

to create specific desired results (Senge, 1990). Senge recognized a growing need in the

global market and responded to it. The competitive corporate environment, change of

technology, personal fulfillment, and the demand to be innovative were all compelling

reasons as to why learning organizations gained such popularity and prominence in the

corporate world (DeVito, 1996). In learning organizations, individuals were working and

learning together (Senge, 1990, 1994; Senge, Kleiner, Roberts, Ross, & Smith, 1994;

Vatcharasirisook, 2011). "The learning organization concept challenges a company to

use knowledge as a basis for its competitive strategy and to see organizational learning as

the bedrock for its ability to be truly global" (DeVito, 1996, p. 78). For some, the

description of learning organizations was a philosophical theory, or a way to view the

world; for others, it was more than a movement. It encompassed a way of life.

Senge (1990) managed to integrate various concepts from OD, with concepts of

system thinking, and created a set of 'core disciplines' of a learning organization.

Relying heavily on the information brought forth by Argyris (1971, 1990, 1991, 1994)

and Forrester (1961), as well his own professional experiences, "Senge captured the

imagination of many practitioners with his view of organizations engaged in a state of

constant learning" (as cited in Harrington, 2000, p. 22). In addition to publishing *The

Fifth Discipline,* Senge (1990) also developed a center devoted to research that he called

the Organizational Learning Center, whose purpose was to "advance the foundations of

theory, methods, and understanding that can make learning organizations a way of life"

(Senge et al., 1994, p. 569). Much of the literature that Senge published concentrated on

providing insights regarding the core disciplines of a learning organization (Harrington,

2000; Senge, 1990; Senge et al., 1994). Those five disciplines were personal mastery,

mental models, shared vision, team learning, and systems thinking (Senge, 1990; Senge

et al., 1994). It was the combination of all five disciplines that allowed individuals to

develop an environment conducive to learning within organizations.

The first of the disciplines was 'personal mastery' (Senge, 1990; Senge et al.,

1994). Senge (1990) advocated that the core of personal mastery produced and sustained

creative tension throughout one's entire life. The core of personal mastery required two

specific skills: a clear understanding of what was important to human beings as

individual people and continuously improved learning to see reality as clearly as possible.

Creative tension was the gap between one's personal vision and one's individual reality

(Harrington, 2000; Senge, 1990; Senge et al., 1994). Before any change was made on an

organizational level, Senge recognized the importance of personal mastery.

The second of the five disciplines was 'mental models' (Senge, 1990; Senge et al.,

1994). Senge (1990, 1994) described mental models as an assumption, image or

generalization that was deeply embedded in our minds that impacted how individuals

understood the world. The mental models that individuals created greatly affected the

information that we took in (Harrington, 2000, Senge, 1990; Senge et al., 1994). What

individuals deemed important determined what they measured or analyzed.

The third of the five disciplines was 'shared vision' (Senge, 1990; Senge et al.,

1994). When a common vision was prevalent, employees or adult learners took an active

role in their organizations. When there is a shared vision, there is a sense of cohesion,

and solidarity. A shared vision offers a common aspiration to work towards together. Senge (1990, 1994) suggested that organizational learning did not exist without a shared vision. Much as athletic teams excel together, an organization excels together. If a soccer team does not work together to achieve the same goal, it was not likely that it would achieve anything of value. The same was true for corporations.

The fourth of the five disciplines is 'team learning' (Senge, 1990; Senge et al., 1994). Team learning focused on team unity. Senge asserted team learning was of greater importance than ever before (Harrington, 2000; Senge, 1990; Senge et al., 1994). Team learning was vital to the success of modern organizations because every major decision was made by a group of people (Harrington, 2000; Senge, 1990; Senge et al., 1994). Team learning required mastering the art of discussion as well as developing critical thinking skills, in order to manage complex organizational situations.

The fifth discipline was 'systems thinking' (Senge, 1990; Senge et al., 1994). System thinking was a way to view organizations from a holistic mindset. In *The Fifth Discipline,* a system was described as a group who consistently came together and operated on toward a goal. By everyone in the team working together towards a common goal, all forces became part of an integrated, common process (Senge, 1990; Senge et al., 1994). By viewing operations from a holistic frame of mind, leaders saw patterns and trends as well as provided feedback as to how to resolve those issues.

Senge (1990, 1994) was a product of his predecessors. Even though he published *The Fifth Discipline* in 1990, it was still pertinent in 2017. His work was considered ground breaking and logical. Senge's work was also andragogical. His works directly and indirectly impacted a number of factors that related to both adult education as well as

OD, organizational learning, and other corporate functions, such as job satisfaction and employee retention. Senge understood how individuals learned separately as well as how to build strength as a group. Senge also grasped the importance of being able to learn, grow, and support your organization as an individual. It was also very clear from his writing that he had experience in management. Senge understood how to build teams that excelled in a corporate environment. Without his research and contributions to the field of organizational learning, other contributors would not have come out of it as well. Chiva and Alegre (2009) may not have developed OLC if it were not for Senge and his research regarding the learning organization.

Organizational Learning Capability. Senge's (1990, 1994) research was instrumental in the development of the OLC. In 2009, Chiva and Alegre proposed the OLC which were defined as the elements that facilitated the process of organizational learning (Goh & Richards, 1997). These dimensions found in the OLC have been linked to other variables, such as job satisfaction and employee retention.

As identified in *Entrepreneurial Orientation, Innovation and Firm Performance: The Importance of the Organizational Learning Capability* and *Organizational Learning Capability and Job Satisfaction: An Empirical Assessment in the Ceramic Tile Industry,* authors Alegre and Chiva (2009) identified five essential dimensions of organizational learning: experimentation, risk taking, interaction with the external environment, dialogue, and participative decision making. The following elaborated on the five dimensions found in the OLC: (a) Experimentation, (b) Risk Taking, (c) Interaction with External Environment, (d) Dialogue, and (e) Participative Decision Making.

In summary, the OLC set a foundation for the building of organizational learning to occur within specific facilities. In addition to being linked to job satisfaction, the OLC was also linked to innovation within organizations. Because the OLC has been linked to innovation, and job satisfaction, it was assumed that learning occurred when these five factors were in place (Jerez-Gomez, Cespedes-Lorente, &Valle-Cabrera, 2005). The OLC trail blazed the way for future pioneers in the fields of OD and organizational learning.

Managers and supervisors as learning leaders. Much like how coaches impact their athletic teams, teachers impact their students. Managers and supervisors function as learning leaders within the organizational setting. Depending on the culture of the work environment, the manager of an employee often functions similarly to how a teacher functions in a classroom environment.

Kanter (1989) suggested that in order to sustain their own competitive advantage, "managers must learn new ways to manage, confronting changes in their own bases of power and recognizing the need for new ways to motivate people" (p. 88). Those who were in managerial roles needed to influence their employees to "believe in the importance of their work is essential" (Kanter, 1989, p. 91). Managers who let their employees take responsibility and who emphasized outcomes over administrative procedures allowed their employees to take ownership within their job roles. "Supervisors should encourage learning from experience and advocate continuous learning" (Vatcharasirisook, 2011, p. 19). When managers allowed employees to take ownership, make decisions, and learn from experience, learning occurred on multiple

levels. This managerial style also allowed for employees to be recognized, and for

solutions that were seemingly different than previous solutions to be utilized.

Porter-O'Grady (1993) also supported an andragogical method of leading teams.

Porter-O'Grady advocated that those in managerial roles should encourage team

involvement as well as to allow others within the team to facilitate learning. Porter-

O'Grady (1993) stated:

> In Industrial Age Organizations, a leader was expected to have the vision and a
>
> strategy for implementing it. The culture was administrative, the expectation was
>
> a response from the organization and the style of implementing was directive. In
>
> today's socio-technical organizations, the culture is collective, the expectation is
>
> involvement and investment, and the style of implementation is facilitative and
>
> integrative. Both staff and management now know that no one person has the
>
> "best" strategy, vision or methodology for a change. (p. 53)

Supervisors were no longer solely responsible for developing a vision and strategy for

success in the workplace environment. Since the OWL movement, the responsibility

shifted from the manager or direct-supervisor to the collective group as a whole. The

direct supervisor was no longer the sole source of accountability. The expectation had

shifted, and the whole team was now considered a source of accountability.

Porter-O'Grady's (1993) leadership style was all encompassing of previous

ground breaking pioneers in the field of organizational learning. Much like andragogical

classroom settings for adult learners, when those in leadership positions allowed others to

facilitate and develop strategies, all of those involved in the process learned from the

experience. It also provided a more connected team approach.

Smith and Green (1993) brought a different perspective to managerial leadership. They proposed as an approach that managers should "manage employees as if they were volunteers" (p.58). In their writing, it was discussed that volunteers chose to volunteer because they wanted to participate in meaningful experiences, they enjoyed the variation in routine, and they wanted the opportunity to realize their own self-interests. Volunteers also had the opportunity to develop new skill sets, familiarize themselves with new people, work as part of a team, and receive intrinsic satisfaction from their work. Volunteers worked productively regardless of compensation. Based on this concept of volunteerism, Smith and Green (1993) noted characteristics that suggested that employees should be led as volunteers, as they wrote:

> Managers can no longer rely on manipulation and control, because these tactics would be counterproductive with volunteers. Managers can no longer rely on veiled threats and innuendos, because these actions would drive away volunteers. Managers cannot reduce labor to a boring set of mundane tasks, because limited participation would lose the support of volunteers. (p. 44)

Volunteerism at its best included elements that allowed individuals that managed their own behaviors, empowered others, and encouraged individuals to take initiative. The mindset of volunteerism viewed managers or supervisors as peers or partners rather than employees or subordinates.

Slater and Narver's (1995) research suggested that facilitative leadership, open structure, and a decentralized method of planning all influenced organizational learning. Those in leadership roles took on the roles of facilitators, coaches, and mentors, in order for the employees to take responsibility for their own learning. Slater and Narver (1995)

encouraged those in managerial positions to allow their employees to make decisions without intervention from their supervisors or managers.

Bolan (2001) focused on younger generations entering the workforce. Bolan (2001) found that there were distinct differences in what factors motivated Millennials and those in Generation Z. "The future Bill Gateses of the world don't want jobs that offer them stock options, but careers that challenge and enable them to be creative" (Bolan, 2001, p. 25). She also determined that Millennials and individuals from Generation Z expressed a desire for lifelong learning, the opportunity to work with leading technology and the desire to perform meaningful work. In order for organizations to develop cultures focused around learning, it was necessary to develop individuals who believed and supported life-long learning. Life-long learning started with the individual before it could become an organizational foundation for any entity.

Amy's (2008) research revolved on how people in leadership positions fostered their subordinates' learning. Much like McGregor's (1960) Theory X vs. Theory Y philosophy, Amy (2008) found that individuals preferred to work with managers who did not have authoritarian leadership styles. It was indicated that those in leadership should adapt their behaviors from authoritarian to more of a guiding behavior in the workplace environment. Amy (2008) suggested that when leaders displayed an informal management approach, the subordinates were more open and trusting of their direct supervisors. Amy (2008) further noted that managers and supervisors actually encouraged learning by "asking questions, clarifying expectations, delegating learning projects, teaching based on their personal experience and example, upholding standards

that foster accountability" (p. 227.) By doing all of those things, leaders were setting the

stage for emotional connections to be built with employees.

The experience and knowledge employees bring to their organizations impact the

overall health of a corporation. Collinson (2008) emphasized that methods that have

worked in the past did not guarantee success in the future. He suggested that leaders in

this century understood that they needed to find new avenues for operating and

leveraging what employees knew. Collinson (2008) also noted the importance of the

creation of environments that encouraged systematic thinking and modernization.

Even though all of these authors wrote about seemingly different topics during

different timeframes, all of them displayed andragogical viewpoints on individual

leadership. All of them displayed methodologies that presented the transfer of

knowledge in a circular pattern. All of these contributors took theories from prior

contributors and combined them into new methodologies. The one aspect that all of them

had in common was the mindset that leadership should be conducted by everyone.

Lastly, all of these individual authors brought something special and inventive to the field

of organizational learning.

Organizational development and organizational learning were both huge concepts

that encompassed many different theories and contributors. While there were far more

theories that could have been focused upon, I decided the theories and contributors

chosen for this literature review were the most progressive and conducive to future

contributors within these fields. There was not one specific cornerstone or founding

moment to OD or organizational learning, yet both of them brought significant value to

both fields. It was suggested that, because both fields were so diverse, that both fields

would continue to develop and change in the future. As companies prepared for future

endeavors, it was vital to have a grasp of how OD and organizational learning functioned

together. It was a common misunderstanding that in order for organizations to prosper,

organizations needed only to implement programs that focused on cutting costs and

making processes very lean.

Six Sigma was one of those programs. It was one of the most popular programs

used by organizations globally. "The six sigma method is a project-driven management

approach to improve the organization's products, services, and processes by continually

reducing defects in the organization" (Kwak & Anbari, 2006, p. 708). While the methods

of Six Sigma dated back to the mid-1980s, it became an increasingly popular program

used by organizations to become more fiscally lean. In the corporate arena, Six Sigma

was a business strategy used to improve business profitability, and to improve efficiency

of all operations so that the needs of the customer were met (Antony & Banuelas, 2001).

Theoretically, the Six Sigma series was andragogical as long as the end result, in fact,

was exceeding of expectations of the customers it served. While Six Sigma was

recognized globally, it was definitely not without its flaws. It was the latter part that

sometimes was forgotten from the process. While being fiscally lean was a major factor

in the success of an organization, it certainly was not the only factor that mattered. When

organizations failed to learn and change as the market changed, either by lack of vision or

personal stubborn ideologies, organizations failed. Leaders within organizations needed

to understand that OD included organizational learning and andragogical leadership

styles.

Employee Job Satisfaction and organizational trust. Both job satisfaction and organizational trust were huge deciding factors in whether or employees chose to remain with their organization or not. "Camaraderie in the workplace goes a long way toward employee satisfaction and retention" (Vatcharasirisook, 2011, p. 31). Positivity and managerial support had a relationship to employee job satisfaction and ultimately employee performance (Brown, 2001; McCullough, 2009; Schyns, Veldhoven, & Wood, 2009). Both employee job satisfaction and organizational trust were closely tied together.

Employee job satisfaction. Employee job satisfaction was one of the largest driving factors in organizations. With that being said, much of employee job satisfaction was deeply rooted in organizational trust. Much like some of the other topics in this literature review, job satisfaction meant different things to different people. The definition varied as the years passed. Weiss, Dawis, and Lofquist (1968) and Locke (1976) defined job satisfaction as the pleasant emotional state that employees felt from the appraisal of their job roles. Another author, Spector (1997), stated "job satisfaction is the extent to which people like or dislike their jobs" (p. 45). In the article, "Organizational Justice Perceptions as Predictor of Job Satisfaction and Organization Commitment*,"* by Bakhshi, Kumar, and Rani (2009) stated, "It is an employee's attitudinal response to his or her organization. As an attitude, job satisfaction is conceptualized as consisting of evaluative, cognitive and affective components" (p. 147). In 2011, Vatcharisiook asserted, "Job satisfaction is the sense of fulfillment and self-esteem felt by individuals who enjoy their work. It is the pleasurable emotional state resulting from appraisal of one's job as achieving or facilitating one's job values" (p. 8). These definitions suggested that employees' beliefs, behaviors, and feelings impacted

how employees perceived overall job satisfaction. Employee job satisfaction was influenced by a number of factors including an individual's ability to complete specific tasks, level of communication within that organization, or treatment of employees by management.

While it was not an exact science, there were a number of predictors that impacted an individual's level of job satisfaction. In fact, Lorber and Savic (2012) found "satisfaction predictors tend to be relatively similar, and include working conditions, relationships with coworkers and leaders, pay, promotion, security of employment, responsibility and working hours" (p. 264). James and James (1989) noted that organizational climate included four main factors: (1) The role of stress and harmony, (2) Job challenge and autonomy, (3) How the leader facilitated and supported employees, and (4) Work-group cooperation, friendliness and warmth.

James and James' (1989) compilation of factors influenced how others viewed job satisfaction in the corporate environment. The factors of the organizational environment allowed others to dig deeper by examining managerial styles and determine how organizations learned as a whole. S. Kim (2002) examined the mechanics of how someone led a team or department and how his or her impact was perceived by the employees of that organization. Factors such as participative managerial styles (S. Kim, 2002) and continuous quality improvement formed the foundation of learning organizations (Ulrich, Jick, & Von Glinow, 1993; Victor, Boynton, & Stephens-Jahng, 2000). Two decades later, Chiva and Alegre (2009) re-affirmed the knowledge that was discovered by James and James' (1989) research that there was a compilation of factors that determined whether employees were satisfied within their job roles. Chiva and

Alegre (2009) stated that job satisfaction was "mainly influenced by working and organizational environment" (p. 324). Every organization had their own individual culture. Some workplace cultures could be described as innovative, warm, and relaxed, while others were described as hostile, harsh, or abrasive. The culture of the workplace greatly impacted whether the employees were satisfied within their job roles. All of these discoveries in research were vital to the continuation of how to measure and increase job satisfaction in the future.

The factors of employee job satisfaction had been studied by many authors. Some of the factors included specific managerial styles possessed by those in leadership positions, and other factors included specific processes that the organizations utilize.

Pfeffer (1982) found that adjusting quality improvement methods within organizations often resulted in an increase in productivity, as well had a positive impact on employee job satisfaction and employee commitment to the organization. When processes were frequently updated and examined for relevancy, organizations were leaner financially and employees used their time and energy more effectively. If procedures were updated frequently, processes were able to function as smoothly as possible with minimal risk for errors. It was when policies were not kept up to date that individuals developed 'work-arounds' in order to perform their daily functions. While one work-around process may not be difficult to be done by the employee, it still wasted time, energy and money of the employee. Over time, those processes that were not fully efficient cost the organization time, energy and money.

Susskind, McKearnen and Thomas-Lamar (1999) found that organizational leadership strongly influenced how satisfied employees were within their job roles. Their

research supported the assumption that those in leadership positions were also learning

leaders, teachers, and facilitators of learning.

     Brown (2001) posited that the key reason that employees left their organizations

had little to do with their organization, but much more to do with their direct supervisor.

In the article, "Employees Leave Managers, Not Organizations," Brown (2001) also

contended that when employees felt unnecessary to the organization, they left. To

prevent employees from leaving, those in managerial leadership positions had to

recognize what their subordinates needed from their workplace environment. Brown

(2001) argued that those in managerial roles should consider themselves servants of their

employees. It was implied throughout this whole article that it was those in the

leadership roles that set the tone for the workplace environment.

     Lacity, Iver, and Rudramuniyaiah (2008) intended to study turnover rates in

Indian Information Systems (IS) professionals and found that employee job satisfaction

was negatively related to the desire to leave the organization. They also found that, when

employees were supported by their managers, supervisors and senior leadership, they had

higher levels of job satisfaction and intention to stay with their individual corporations.

"Without a doubt, satisfied employees are the ultimate goal of every leader" (Lorber &

Savic, 2012, p. 264). Therefore, Lacity, Iyer, and Rudramuniyaiah (2008) concluded that

the supervisor's managerial style impacted the employees' job satisfaction level as well

as the employees' intention to stay with the corporation.

     Bakhshi et al. (2009) examined the perceptions of organizational justice, job

satisfaction, and organizational commitment of a medical college in India. While the

specific medical college remained anonymous throughout the study, Bakhski et al. (2009)

were associated with the University of Jammu. "Regression analysis of the data obtained

indicated that distributive justice was significantly related to job satisfaction whereas

procedural justice was not found to be related significantly to organizational

commitment" (Bakhshi, Kumar, & Rani, 2009, p. 145). In the article, "Organizational

Justice Perceptions as Predictor of Job Satisfaction and Organizational Commitment,"

Bakhshi et al. (2009) analyzed 128 employees of a medical college affiliated with the

University of Jammu in India. Bakhshi et al. (2009) found that when employees were

treated fairly, justice was wide spread. Employees were held accountable for not

following procedures, and employees were more likely to be committed to their

organizations.

        H. Kim (2009) surveyed employees within his organization to determine the role

that organizational justice played on employee job satisfaction. In the article,

"Integrating Organizational Justice into the relationship Management Theory," H. Kim

(2009) found that employees who felt that they were treated fairly by their managers and

organization tended to develop mutual relationships built upon reciprocity, trust, and

respect. H. Kim (2009) also found that when relationships were established, employees

were more likely to be satisfied with their job roles and therefore, committed to their

organizations.

        Y. Kim's (2009) research focused on the impact of corporate alignment. He

found that organizational goal alignment and support had a profound impact on employee

job satisfaction, and the employees' overall commitment to the organization. It makes

sense that goal alignment had a significant impact on employee job satisfaction. When

an organization creates a sense of cohesion and unity, employees and managers are able to work together to achieve those goals.

Schyns, Veldhoven, and Wood (2009) attested that leaders who had a stronger relationship with their employees led to a greater sense of job satisfaction throughout the organization. Therefore, employees performed better in supportive workplace climates. Schynds et al. (2009) further indicated that "when they (managers) interact with followers individually, they should be conscious of how they relate to others, and the negative consequences of variation in their degree of supportive leadership between individuals (p. 659). The relationships that leaders build with their employees is vital to the level of satisfaction that employee has in his or her job role.

Lorber and Savic (2012) imparted that satisfied employees had a crucial role in the success of an organization. In the article, "Job Satisfaction of Nurses and Identifying Factors of Job Satisfaction in Slovenian Hospitals," Lorber and Savic (2012) researched how to establish a strong level of job satisfaction. Lorber and Savic (2012) recommended that employees' job satisfaction needed to be monitored on an annual basis. As individuals transition in and out of job roles under the healthcare umbrella and as regulatory bodies developed new best practices, organizational change was expected. This article was important because it stressed the importance of employees' job satisfaction, especially in the field of healthcare. It also took the opportunity to provide tips that those in healthcare facilities could use in order to set a standard of high levels of job satisfaction.

In 2011, Vatcharisiook used a measurement tool called the Modified Instructional Perspectives Inventory (MIPI) to measure the levels of trust, empathy, and

sensitivity that employees perceived to have in their direct supervisor. The MIPI was

originally created by Henschke (1989, 1998, 2009) as a way to measure the levels of

trust, empathy and sensitivity that adult learners have with their instructors.

Vatcharsirisook's (2011) study found that employees who scored their supervisor's levels

higher in trust and empathy on the MIPI had a direct relationship on higher job

satisfaction levels than those employees who rated their managers lower in trust and

empathy on the MIPI. Vatcharasirisook's (2011) study was important because it changed

the way employee-direct supervisor relationships were viewed within the corporate

setting.

        Kasekende, Byarugaba, and Nakate (2013) examined the relationship between

service orientations, employee job satisfaction, and employee retention of elementary

public schools in Uganda. Kasekende et al. (2013) found that employee job satisfaction

was absolutely vital to employee retention for those educators teaching in primary

schools in Uganda. Kasekende et al. (2013) found that it was necessary for public

schools, to adapt to policy in order to improve employee job satisfaction and therefore,

employee retention.

        Job satisfaction was a topic that has been studied by many, but there was still no

conclusive response as to what could fall under the umbrella of job satisfaction. Each of

these previously discussed authors found a different way that organizations were

impacted by employee job satisfaction. Many of the authors that studied employee job

satisfaction within their organizations also found connections to organizational trust.

        Connection to organizational trust. Employee job satisfaction was rooted

deeply in organizational trust. Whether a person felt satisfied in his or her job role and

with his or her organization had a direct impact on whether he or she felt a sense of trust

within their department and supervisor. Kreitner and Kinicki (1998) described trust as

the faith shared by individuals with similar intentions and behaviors. Trust implied that

there was belief in the character and integrity of organizational leaders. Starnes, Truhon,

and McCarthy (2010) all recognized that, although there were many definitions of trust,

every one of them referred "to similar, intangible characteristics of human behaviors" (p.

2). Henschke and Kheang (2015) defined trust as the belief that a person was reliable,

good, honest, and effective. The concept of organizational trust relied on the belief that a

person displayed character, ability, strength, or truth. While all of the definitions were

slightly different, trust revolved around the feeling that individuals had regarding

reliability, integrity, and honesty. "The term organizational trust can be used in several

ways" (Starnes et al., 2010, p. 2). Much like the other topics referenced in this section,

organizational trust was defined differently from individual to individual and

organization to organization. While there were a number of varying definitions, all of

them focused on the perceived impression of character, and integrity. Each organization

determined how trust was measured and used within their facilities.

There were two types of trust that revolved around corporate environments.

There is interorganizational and intraorganizational trust (Starnes et al., 2010).

Interorganizational trust was "trust between two organizations" (Starnes et al., 2010, p.

2). An example of interorganizational trust was the relationship that companies had with

their vendors. An example of this would be the affiliation that the restaurant Taco Bell

had with Pepsi Co. Taco Bell exclusively served Pepsi products. Another example was

how McDonald's restaurants globally served Coca Cola products exclusively.

Intraorganizational trust was a term that referred to the trust that was built within one organization (Starnes et al., 2010). Intraorganizational trust focused on the relationship between workers and their supervisors, or the relationship between workers and the senior leadership of the organization.

Benefits of trust. There were a number of benefits to building trust with organizations, as well as individuals. Besides overall higher levels of job satisfaction, "organizations with high levels of cultural trust tend to produce high quality products and services at less cost because they can recruit and retain highly motivated employees" (Starnes et al., 2010, p. 6). Employees who were trusted within their organization were more likely to be intrinsically motivated by their work (Atkins, 2016). In the article "A Primer on Organizational Trust" Starnes et al. (2010) asserted that trust building increased the likelihood that employees enjoyed their work, and took the time to perform their jobs correctly. Employees felt empowered when they were trusted to take risks, and to be innovative (Atkins, 2016; Starnes et al., 2010). When trust was reciprocal between an organization and its employees, the employees were more likely to believe in the mission and embraced the values of the organization.

Organizational trust within the literature. Dirks and Ferrin (2002) researched the direct effects of employee trust on corporate outcomes. First, Dirks and Ferrin (2002) found strong a correlation between the trust in the employee's direct supervisor and job satisfaction. Second, Dirks and Ferrin (2002) explored the employees' levels of trust with their direct reports vs. organizational leadership. Finally, this research confirmed that employees who exhibited trust in their direct reports had a positive relationship to the

employee's commitment to the organization. When employees trusted their managers or supervisors, they were more likely to trust their organization as well as to commit to it.

Dashborough (2013) recognized that those in authentic leadership roles actually had the ability to strengthen organizational trust and therefore, exhibited overall commitment to an organization. When individuals commit to an organization over a period of time, knowledge and experience are gained by the individual as well as the organization.

Yang and Mossholder (2010) reaffirmed the research of Dirks and Ferrin (2002) when they found that employees' level of trust had a direct relationship with their organizational commitment. Employees who trusted their supervisors were more likely to remain committed to their team and organization as a whole.

Holland, Pyman, Cooper, and Teicher (2011) explored the amount of trust that employees had in their managers in Australia. They found that levels of employee trust were higher when they did not negotiate through a middle man when working with union representatives. Holland et al. (2011) noted that by treating staff and employees as individual people rather than a collective whole, it enabled managers to gain a sense of understanding, and therefore, they gained more freedom and tasks that allowed them opportunities for advancement.

Lorber and Savic (2012) researched the factors that contributed to job satisfaction in Slovenian hospitals. In their research, they not only identified leading factors of job satisfaction, but also identified that, without trust of both the manager and the peers of the employees, job satisfaction did not exist. "When establishing the level of job satisfaction, we should focus on how employees feel about their work and personal relationships in

the workplace, and how leaders influence employees' satisfaction" (Lorber & Savic,

2012, p. 264). Intraorganizational trust was ultimately a major factor in how the staff

were treated and how the employees performed in their job roles.

Atkins (2016) studied how to best reach and empower employees working in

service industries. In his article, Atkins (2016) found that "operationally speaking,

empowerment is critical, because in our fast-changing environment, a lack of it will

impair employee responsiveness. Dynamic business environments require rapid,

decentralized making in order to meet evolving customer needs" (p.125). In this article,

Atkins (2016) worked to dig deeper into why employees trusted or distrusted of their

managers.

Xiong, Lin, Li, and Wang (2016) examined the amount of trust that employees

had with their managers, and the employees' commitment to their organization. They

recognized that with the modernization of corporations, interpersonal relationships built

on the foundation of trust between employees and their managers was vital to success.

Xiong et al. (2016) affirmed that when employees had trust in their managers, it

suggested commitment to the organization.

From the review of the literature, it is apparent that job satisfaction and

organizational trust are greatly influential in many organizations. "Job satisfaction or

Employee Satisfaction is one of the most used variables in Organizational Behavior"

(Bakhshi et al., 2009, p. 145). Of the factors, the main influences included the

relationship that individuals have with their managers, supervisor or direct report, and the

support individuals received from their organization. "Satisfied employees play a crucial

role in an organization's success" (Lorber & Savic, 2012, p. 263). While the individual's

leadership style does not impact every factor of job satisfaction, it plays a critical role in whether or not an individual is content in his or her job role and organization.

Employee Retention and Turnover

Sustainability as well as the health and vitality of any organization depends greatly upon the retention of long-term, competent employees. Herman (1997) asserted that "workforce stability is a powerful competitive strategy and will become even more vital in the foreseeable future" (p. 25). With long-term, competent employees came a wealth of knowledge and experience that was not easily replaceable. "Employee turnover is a common phenomenon which many organizations are facing today" (James & Mathew, 2012, p. 79). Because organizations invested immensely in the recruitment and training of their new hires, the problem of employee turnover posed a huge potential loss for any corporation. Employees were the most valuable asset in any organization (Adebayo, 1981; Agarwal & Ferratt 2002; Ejiofor & Mbachu, 2001). It was exponentially expensive to keep replacing workers. Competent, skilled workers were the most valuable resource that a company could have. "Retaining a skilled workforce and decreasing unwanted employee turnover is an economic and service delivery necessity for organizations" (Belbin, Erwee, & Wiesner, 2012, p. 742). In order to establish an andragogical corporate environment rooted in learning and organizational trust, high employee retention and low employee turnover was vital.

Employee retention. It is no surprise that many organizations were concerned about employee retention. Aruna and Anitha (2015) described employee retention as "the process of making employees (desire) to stay with the organization" (p. 94). It is not surprising that organizations desired to retain their high-performing, long-term

employees. Peterson (2005) noted that employee retention was an area of concern for a

number of years. In the article, *Reducing Costly Employee Turnover,* Herman (1997)

claimed that the longer competent individuals were with the company, the better off the

organization was. The loss of individuals within an organization was costly on a number

of levels. Employee retention was said to be "a management initiative through company

policies to create a high degree of employee satisfaction with the ultimate motive of

retaining employees" (Dey, 2009, p. 45). Most organizations recognized the significance

of being able to retain competent, long-term employees. In fact, most organizations had

devised strategies and programs to help retain their high-performing, long-term

employees. Belbin, Erwee, and Wiesner (2012) stated that retention was "key to

operational and service excellence" (p. 742). Employee retention had a direct impact on

a corporation's bottom line. "Longevity usually results in dedication to high performance

and an understanding of how to bolster profits" (Herman, 1997, p. 15). Besides

connecting directly to an organization's bottom line, employee retention was also

important because "having stayed in the company for a considerable period of time the

employee becomes a repository of knowledge" (Dey, 2009, p. 45), which reinforced the

mindset that employees were definitely the most important and valuable resource that

organizations had. It was the goal of many companies to prevent the loss of long-term,

competent employees within the workplace setting.

Most organizations had a common goal of decreasing employee turnover,

increasing employee appreciation, and improving consistent communication between the

employees and leadership of the organization. "This goal requires high employee

retention, employee appreciation, ongoing communication with employees, listening in to

the employees' suggestions and creating a proper motivation" (Dumitrescu et al., 2012, p.

11). Long-term, competent employees were major assets to the organization and

organizations could not risk losing their key performers.

There are many benefits of employee retention in organizations. "A keen

sensitivity to the shifts in worker attitudes will strengthen your strategic perspective"

(Herman, 1997, p. 15). In Herman's (1997) article, it was noted that "when people stick

around long enough to know your customers, suppliers and their fellow employees,

things work out much more smoothly. The longer they are with you, the better the

results" (p. 15). In the article, *Employee Retention Strategies: IT Industry,* James and

Mathew (2012) supplemented that by "providing competitive salaries and other benefits,

empowerment, providing stock options, flexible work hours are few of such strategies

adopted by the firms to retain their staff" (p. 80). Many organizations believed it was the

overall package of benefits and salary that enticed people to remain with the organization

over long periods of time. While all of those factors added into whether a person felt

satisfied within the job role, they were not the only factors at hand. Organizations that

had high employee retention levels took measures to encourage employees to remain with

the organization. Long-term employees became like the roots of a tree; when the roots of

the tree were removed, the tree was always severely damaged or destroyed.

Employee turnover. Employee turnover is the rate of how many employees left

an organization or career over a specific period of time. Employee turnover was a

problem faced by corporations worldwide. People left their corporations for a variety of

reasons. Lack of motivation in the workplace was considered one of the key factors as to

why people left their organization (Mitchell, Holtom, Lee, Sablynski, & Erez, 2001). In

the article *Employee Retention: The Secrets Behind Wal-Mart's Successful Hiring Policies,* Peterson (2005) concluded that if new employees were surrounded by a welcoming environment and a supportive managerial team, the employees chose to engage with the organization. In 2012, it was noted by James and Mathew that people left their jobs because of job-related stress and stressors, lack of employee satisfaction, and lack of commitment to the organization. "Personal dissatisfaction itself is a major reason for an employee to leave the firm" (James & Mathew, 2012, p 79). Authors suggested there were a number of factors that contributed to employee dissatisfaction, including salary, working conditions, relationships with peers and managers, opportunities for advancement, or overall culture of the environment (; James & Mathew, 2012; Lorber & Savic, 2012). While Bolan (2001) acknowledged that there were many reasons that people left, she asserted that people left because of the culture of their workplace and the relationship that the employee had with his or her direct report. Bolan (2001) also posited that individuals needed to feel comfortable in their jobs; that the social atmosphere was almost as valuable as the actual work. If individuals did not feel valued, or wanted, they would leave to go to an organization that welcomed and supported their endeavors. When people left their organizations, it was representative of an exodus of human capital and resources. Individual employees were the largest source of knowledge that a company would ever have.

Cost of turnover. When organizations experienced high turnover, they paid a very expensive cost. Regardless of the company, it was very expensive to lose employees. Peterson (2005) noted that "it is incredibly frustrating to go through a long hiring process, employee training, providing uniforms and other necessities, and then

have the employee quit after two months" (p. 85). Although the costs varied from

individual to individual, authors agreed that the level and job category of the employee

determined the cost to lose that specific individual (Brown, 2001; Cheng & Brown, 1998;

Dess & Shaw, 2001; James & Mathew, 2012; Lawson, 2010; Mushrush, 2016; Peterson,

2005). As driven as many organizations were financially, and procedurally lean as

possible, it made sense that those in leadership roles worked to figure out why their

organization lost their employees. "Given that there is an increase in direct and indirect

costs of labour turnover, therefore, management is frequently exhorted to identify the

reasons why people leave organizations so that appropriate action is to be taken by the

management" (James & Mathew, 2012, p. 80). In 2001, Brown said, "The cost of losing

a valuable worker can be sobering" (p. 25). Some of the direct costs of turnover included

the process of recruiting staff to replace the lost employees, cost of training materials to

be developed, time and effort of other employees to teach, and the actual salary of the

new hire (Brown, 2001; Herman, 1997; James & Mathew, 2012). Some of the indirect

costs included the loss of customers due to inadequate staffing, inferior product quality,

low staff morale, growing reputation for high turnover, difficulty maintaining positive

corporate culture, and inefficiency due to ignorance of systems or procedures (Brown,

2001; Herman, 1997; James & Mathew, 2012). Many organizations implemented

programs as well as a variety of strategies with the hope that employee retention would

improve and turnover would decrease. While there were a number of reasons as to why

employees chose to stay or leave their organization, there will never likely be just one

formula that worked for every organization.

While authors did not agree on a specific formula, they did agree that it was very costly and it varied from organization to organization. While some organizations' costs were "as low as a few hundred dollars to as high as four times the annual salary of the employee" (Mushrush, 2016, para. 4). The position that was being replaced caused there to be a variation in exactly how much replacing one employee would cost. "For an entry-level support person, the cost is one-and-a-half times their salary. For senior executives, it is usually 10 times their compensation" (Brown, 2001, p. 25). In the article, *Reducing Employee Turnover in Your Lab,* Lawson (2010) espoused that "it is not common for turnover to cost 50% to 200% of an employee's annual salary (p. 38). While neither one of the authors was incorrect in their estimations, it just showed how much variation there could be from position to position. In 2016, the article, *Reducing Employee Turnover*, Mushrush explained the cost of turnover on a very fundamental level. Mushrush (2016) stated that "on average, it costs a company one-third of a new hire's annual salary to replace an employee. At Missouri's 2015 minimum wage of $7.65 an hour, the cost to replace just one employee is more than $5000" (Para. 5). Additional costs included a negative effect on departmental culture, erosion of organizational memory, and a decline in employee morale (Cheng & Brown, 1998; Dess & Shaw, 2001; James & Mathew, 2012). The indirect costs led to a decline in the quality produced, additional costs of being short staffed, and a decline of customer service. (Cheng & Brown, 1998; Dess & Shaw, 2001; James & Mathew, 2012). Therefore, it was safe to imply that employee turnover often placed additional stressors on managers' time and effort as well as placed added pressures to an already stress-filled environment.

Fitz-Enz (1990) identified that employee retention was influenced by more than one factor. He asserted that those in managerial roles needed to pay attention to factors such as compensation, rewards and recognition, job security, the training that employees received, support of their direct report, and overall workplace culture. His literature was important because it recognized that, while job satisfaction was a broad term, there were many factors that impacted whether an employee chose to remain or leave the organization.

Gomez-Mejia and Balkin (1992), Scott, Morajda and Bishop (2002), and Heneman and Judge (2003) all studied the impact of rewards programs as a strategy to retain and engage employees within their organizations. While they all agreed that rewards may impact the climate, Heneman and Judge (2003) argued that rewards must be meaningful, organizations must keep their promises for the rewards, and the reward system had to be just and fair. Although extrinsic motivators, such as bonuses, or gifts, were positive, adult learners were intrinsically motivated. Adult learners' passion to learn came from within their individual passions and interests. If the rewards were intrinsic, the adult learners, or employees would be further engaged in their job performance. Therefore, it was assumed that reward systems impacted organizational performance.

Okoh (1998) studied employees and the motivation they had to put their goals into actuality. He reported that there was a relationship between employee retention, motivation, and job performance. Okoh (1998) found that when employees were adequately motivated, the tendency was that they wanted to remain with their

organization. When employees displayed motivation, it implied that they were engaged

with their organizations. Engaged employees were invested employees.

In 1999, Osteraker declared that employee job satisfaction and retention were the

key dynamics in determining the success of an organization. He discussed the

dimensions of employee retention, such as mental, physical, and social. The mental

dimension consisted of the tasks that were considered part of the actual job. It was the

tasks that allowed flexibility and the use of one's knowledge within the arena of the job.

The physical dimensions focused directly on working conditions and compensation. The

social dimension consisted of the networking and bonding with peers and management.

Therefore, the level of job satisfaction directly correlated with whether the employees

chose to remain with the organization.

Stein (2000), Clark (2001), and Parker and Wright (2001) all focused their studies

around using extensive benefits in the realm of human resources to attempt to influence

employee commitment and retention. Each one of these authors wanted to determine

how the benefits packages offered to employees impacted whether an employee chose to

remain or left an organization. Consistently, all of these authors found that the benefits

packages offered did play a minor role in whether the employees felt satisfied, but it was

not the only factor required to encourage employees to remain with their organizations.

In 2001, Walker discovered that there were seven specific factors that could

potentially boost employee retention: (a) appreciation of completed tasks and fair

compensation, (b) facilitation of challenging tasks, (c) opportunities for promotion and

learning, (d) a welcoming, supportive atmosphere, (e) positive relationships with peers

and leaders, (f) healthy work-life balance, and lastly, (g) good communications

throughout the organization. All of these factors set the foundation for a healthy

workplace environments and a culture for learning.

Mitchell, Holtom, Lee, Sablynski, and Erez (2001) found in their research that

when given alternatives, employees' job satisfaction and commitment were higher. If

people were offered an opportunity to perform their job role innovatively, they were more

engaged with the work they were producing. On the contrary, Mitchell et al. (2001)

found that those with fewer alternatives did not feel as connected to their jobs or their

organizations.

Agarwal and Ferratt (2002) examined the utilization of Information Technology

(IT) needs based on the availability of IT professionals to plan, create, and maintain

various kinds of information systems. They found that retaining the IT staff had been a

crucial factor in achieving the organization's strategic goals. While employee retention

was important in any industry, it became specifically advantageous in the field of IT.

Most IT professionals worked on long-term projects that changed the procedures used

daily by all throughout the organization. When any professional who knows the specific

details of a long term project leaves, that specific project is delayed.

Kehr (2004) took a different spin on retention factors. He divided the retention

factors into three variables: power, achievement, and affiliation. Kehr (2004) inferred

that power found in organizations was represented by dominance and social control.

Achievement occurred when employees surpassed expectations and performed well.

Affiliation referenced the social relationships and bonds were established in a workplace

environment. When all three of these variables were combined together, organizations

had the opportunity to positively support their staff and leadership. Organizations set the

stage for their employees to grow individually within the organization.

Holtom, Mitchell, Lee, and Inderrienden (2005) studied the relationship between

dissatisfaction in the workplace, employee turnover, and individual job performance.

When employees left organizations, it increased the staff dissatisfaction of the remaining

employees and impacted the individuals that applied for the newly-opened positions.

Hytter (2007) asserted that when organizations, more specifically management,

displayed personal traits of loyalty, trust, commitment, and attachment, it had a direct

relationship with employees' retention. She also determined that while organizational

factors such as reward and recognition programs, variances in leadership style,

opportunities for promotion, and work-life balance were important, they were not as

important as the relationships built within the workplace.

Gberevbie (2008) studied the relationship between employee retention strategies

and organizational performance of employees. In the article, *Employee Retention*

Strategies and Organizational Performance, Gberevbie (2008) examined what, if any,

strategies would be the most useful to retain employees. Gberevbie (2008) used a sample

size of 120 in one of the leading beverage companies in Nigeria to show that with

adequate employee retention processes in place, employees performed their job roles

more effectively and efficiently. In this article, Gberevbie's (2008) indicated that any

organization could fail if the proper employee retention strategies were not in place,

therefore increasing organizational turnover.

Gaan (2011) found a major issue with employee turnover specifically in the field

of IT. In the article, *Revisit on the Impact of Job Attitudes on Employee Turnover: An*

Empirical Study in Indian IT Industry, Gaan (2011) noted that IT personnel had a greater

tendency to leave their current employers to work for another. There was no conclusion

as to why IT professionals were less likely to stay in one position for long periods of

time. This article was relevant because it identified a piece of the puzzle that had been

missing previously. Even though IT professionals were likely to leave one organization

for another, IT professionals did not opt to leave the field of IT altogether.

In 2012, Belbin et al. were interested in determining what strategies could be used

in a healthcare environment to retain nurses. Their article explored the perceptions of

379 nurses in a healthcare system in Australia as well as the effectiveness of 28 different

workforce retention strategies. They discovered that those participants were more aware

of their surroundings, and those that participated in a number of retention strategies

tended to have less desire to leave their organization. Engaged employees did not have

the desire to leave their organizations. If they were engaged in their organizations, they

tended to be more satisfied in their job role. The biggest flaw identified in this study was

that it only focused on nurses. While nurses were a valuable portion of the healthcare

system, they were not the only job role. There were many other functions that supported

the work that nurses did. James and Mathew (2012) examined the impact of various

retention strategies on employee turnover within organizations on IT professionals in

India. In their study, they examined a number of benefits, perceived levels of job

satisfaction, and employees' intention to stay to determine if they actually impacted why

people stayed with their organizations. The main focus throughout this study was to

determine how valuable the benefits offered to the staff were in retaining employees over

a period of time. What was found during the course of this study was that while those

additional benefits were enticing to the employees, the benefits were not the only reasons

that individuals chose to stay with the organization over a period of time.

Callahan's (2014) literature focused on how to reduce turnover, specifically in the

industry of retail or sales. He recognized the importance of retention and the issue of

turnover. Callahan (2014) asserted that when people left their organizations in large

numbers that it was the whole company that needed to stop and re-examine everything

that they had done and reflect on what could be done better in the future. In this article,

Callahan (2014) insisted that the best way to positively influence employees was to help

them develop a sense of ownership in their jobs and encourage them. "I have often said

that after food, clothing, and shelter, man's next basic need is appreciation. If you agree,

then you possess the attitude to build better employee morale, which is indeed a critical

key to long-term employee retention" (Callahan, 2014, p. 24). After the basic needs of

employees are met, then the social, financial, and additional needs of the employees are

fulfilled. Supportive managers and warm environments were well received by employees

within a number of organizations.

Retention management. In order to be proactive, organizations needed to have

an effective retention management process in place. Retention management "requires

ongoing diagnosis of the nature and causes of turnover" so that a strategic plan could be

implemented (James & Mathew, 2012, p. 80). In 1997, Herman suggested reviewing

retention and turnover rates on a frequent basis. He also suggested reviewing the costs

per individual job role on a yearly basis so that turnover could be as preventable as

possible. "While it is not complicated, it does require serious resolve on the part of the

senior leadership and every manager in the company" (Herman, 1997, p. 16). Some of

the programs put into place suggested options intended to intrinsically motivate

employees, like creating an open environment, showing appreciation, openly

communicating within the organization, and encouraging high performance of employees

(Herman, 1997; James & Mathew, 2012; Lawson, 2010; Mushrush, 2016). While

organizations recognized factors that impacted retention and turnover, there will likely

never be a specific formula as to how to manage retention with every organization. It

varied from organization to organization and program to program.

        The literature was pretty consistent in this section on employee retention.

Although it was expensive to retain competent, high performers, it was even more costly

to re-hire competent high-performers. There were both direct and indirect costs

associated with employee turnover. Authors also agreed that long-term, competent

employees who remained with the organization over a period of time became one of the

most valuable assets of that organization. With long-term employees came history of

past trials, tribulations, and triumphs. Long-term employees brought with them a wealth

of knowledge that could be used to advance the organization on a consistent basis.

Summary

        Of all the factors that I could have written about in Chapter Two, I specifically

chose four sections: (a) Andragogy, (b) Organizational Development and Learning, (c)

Employee Job Satisfaction and Organizational trust, and lastly, (d) Employee Retention

and Turnover. Each one of these factors was important to the progression of

organizational health. While each of these factors was vital to the health of any

organization, organizations did not thrive unless all of these factors were used in tandem

with each of the other factors.

While the concept of andragogy was originally used for adults in classroom environments, it was easily adapted to be used in various other environments. Andragogy was the teaching and learning of adults. Learning was used not only in classroom environments with text books and desks, but also in meetings, workshops, and corporate environments. Learning never stopped. Adults who desired to grow professionally or personally were andragogical. In order to be connected to one's organization, employees needed to be involved not only in their job roles, but their departments and whole organizations. When employees took a part in their workplace learning, they took ownership in the work they did. Employees, much like adults learning in the classroom setting, also valued their previous experiences. Employees relied heavily on past experiences in order to make future decisions. Employees and adult learners both valued relevancy. In organizations, employees were typically interested in learning about topics that could be used immediately in their workplace situations. And lastly, adult learners were problem-centered individuals. It was not uncommon for andragogical methodology to be used in board room meetings, new employee training sessions, and online webinars. Andragogy had shifted how organizations developed their resources, and their employees. While andragogy was applicable to stand on its own in the classroom environment, it strengthened individual organizations when paired with OD and organizational learning.

Because andragogy shifted how organizations developed, it was vital to discuss the history of OD and how organizational learning impacted companies' bottom lines and prospects for future growth. Organizations could no longer rely on budget cutting to ensure sustainability. OD processes focused on changes in processes, procedures, fiscal

budgets, or social workplace environments. Organizations needed to be developing in order to keep up with both a changing market and a changing audience. Organizational learning was not just applicable to the employees within the entity. It also was applicable to the leadership who were making decisions that impacted the whole company. Organizational learning could be internal as well as external. Learning played an important role in how organizations grew or changed in the future. Three examples of companies that failed because they did not recognize the need to adapt to their future markets were Circuit City, Blockbuster Video, and Borders. All three of these companies lacked the vision to see how learning from their competitors could influence their own job markets. All three of these companies also closed their doors after having been open for decades. When the leaders in organizations did not support organizational learning and development, their products and services became stagnant.

Employee job satisfaction and organizational trust were two of the most coveted topics in the corporate world. So much of what made employees satisfied with their jobs was related to organizational trust. There was no specific formula for creating job satisfaction; there were a number of predictors that led to an individual's job satisfaction. Those factors included working conditions, the established relationships with leadership and their peers, salary, opportunities for advancement, and flexibility of schedules. As employee job satisfaction was deeply rooted in organizational trust, there was a great need for organizational trust within an organization. Both employee satisfaction as well as organizational trust connected directly to andragogy, OD, and organizational learning. Andragogical leadership styles of supervisors and managers was pertinent to the development of organizational change and learning. Through the principles of

andragogy, employees felt more connected to their leadership, and therefore, to their organizations. When employees exhibited more trust in their leadership, they were more satisfied in their jobs and organizations.

Sustainability and longevity of organizations was contingent upon the retention of long-term, competent employees. With longevity of competent employees came the most valued resource that organizations had. Retention of skilled, experienced employees was a necessity for organizations. In order to establish an andragogical corporate workforce rooted in trust and learning, high employee retention was a necessity. I concluded that all of the factors functioned together. It was challenging to thrive when even one of these factors was missing from the cycle. All of these functioned together in a circular fashion. When leaders led with styles that promoted andragogical methodology, organizations were able to learn. When organizations promoted learning on an individual and corporate level, policies, procedures, and quality could be improved. When leaders promoted andragogical methodology, open discussions could be held and people could find relevancy in their everyday routines. When individuals were comfortable promoting two-way conversations with each other in a corporate environment, ideas and suggestions would be interchanged and trust was built. According to the literature in this section, when individuals exhibited trust, they had higher levels of job satisfaction. Organizations whose leaders were not rooted in andragogical principles and learning struggled with organizational trust as well employee retention. Thus, because andragogy, OD, organizational learning, trust, and job satisfaction were all elements that impacted employee job retention and turnover, I wanted to start with one of the most fundamental relationships that employees had: the one that they had with their direct supervisors.

Chapter Three: Methodology

Using a mixed-methods research design, I explored employees' perceptions of their relationships with their direct supervisors within a healthcare facility. The methodology within this chapter is divided into three sections: (a) the three-part research design, (b) participants involved in the research study, and (c) research procedures.

Three-Part Research Design

The survey-questionnaire appeared in a three-part research study. Part I of the survey-questionnaire consisted of the participants' demographics. Part II consisted of the Modified Instructional Perspectives Inventory — Employee-Direct Supervisor (MIPI-EDS), which was developed by Henschke (2016) and had been used in 22 dissertations and validated for reliability in three of those dissertations. Part III consisted of Likert-style questions and open-ended questions that discussed job satisfaction and specific aspects of the employees' relationship with their supervisors. Part I and Part II of the study was open to permanent employees who were employed within a small section of the PBS division and who chose to participate in this study. Part III was available to employees who were then-currently employed within one of the participating departments within the PBS division chosen to participate in the study, who had completed Part I and II, and been with the organization for longer than five years. Part I and II combined took an estimated 20 to 30 minutes for each participant to complete. Part III took an additional estimated 30 minutes to complete by those who were eligible to participate.

In 2016, formal approval was obtained by Henschke (2016) to adapt and use a modified version of the original IPI. The IPI had since been modified to be used in a

variety of studies. The MIPI-EDS was compiled with my questionnaire into one survey-questionnaire so the possibility of having employees' information exposed or mixed with another employee's information was eliminated.

Part I of research design. Part I of the three-part research study was intended to be primarily demographics. Part I was the shortest part of the survey-questionnaire, as it was only pertaining to the employees' specific demographics.

Part II of research design. Part II of the research study was Henschke's (2016) MIPI-EDS as the measurement tool. The original IPI was developed by Henschke (1989). The purpose of the IPI was to measure the beliefs, feelings, and behaviors of adult educators when they conducted adult education (Henschke, 1989). "The IPI was a self-report tool with a specific scoring key" (Stanton, 2005, p. 11). Originally, the IPI was designed on a four-point Likert Scale offering responses of never, rarely, sometimes, and often, and consisted of 45 different items. This measurement tool was built around seven specific factors. Those factors were: (a) Teacher empathy with learners, (b) Teacher trust of learners, (c) Planning and delivery of instruction, (d) Accommodating learner uniqueness, (e) Teacher insensitivity to learners, (f) Learner-centered learning process (Experience based learning techniques), and (g) Teacher-centered learning process.

McManus (2007) noted that it was during the process of the IPI re-organization that Stanton modified the original IPI from a four-point Likert scale to a five-point Likert scale and changed the verbal anchors. The responses were changed to almost never, not often, sometimes, usually, and almost always (Stanton, 2005). It was noted by Moehl (2011) in his dissertation, *Exploring the relationship between Myers-Briggs Type and*

Instructional Perspectives Among College Faculty Across Academic Disciplines, that

Stanton also enhanced the modified-IPI by adding various category levels regarding the

usage of andragogical principles. Results can be seen in Table 2.

Table 2

Use of Andragogical Principles Category Levels

Use of Andragogical Principles Category Levels

Category Levels	Percentage	IPI Score
High above average	89-100%	225-199
Above average	88-82%	198-185
Average	81-66%	184-149
Below average	65-55%	148-124
Low below average	54%	<123

Note: (Stanton, 2005)

Since the original conception of the measurement tool, it was used in 22 doctoral

dissertations at a variety of universities, some of which included the University of

Missouri — St. Louis, Lindenwood University, and Kanas State University. It was also

formally validated as a measurement tool three times. In Table 3, the complete list of

dissertations is referenced. The measurement tool has been adapted for use in non-

classroom settings as well.

The MIPI was used in a variety of dissertations written from perspectives ranging

in industry, field, and topic. It proved to be a valid instrument within all the studies used.

As andragogy continued to develop and progress through a variety of fields, the MIPI

remained consistently a valid tool to measure trust, empathy, and sensitivity of learning

environments.

Table 3

Doctoral Dissertations that used/validated the IPI or MIPI

Year	Author	Dissertation Title	Facility
1995	Thomas, E.	An Identification Of Instructional Perspectives Of Parent Educators.	KSU
1997	Seward, S.	An Identification Of The Instructional Perspectives of Kansas Parents as Teachers Educators	KSU
1997	Dawson, S.	Instructional Perspectives of Nurse Educators	UMSL
2003	Drinkard, G.	Instructional Perspectives of Nurse Educators in Distance Education	UMSL
2005	Stanton, C.	(Modified instrument and first validation) A Construct Validity Assessment of the Instructional Perspectives Inventory. (IPI.)	UMSL
2006	Stricker, A.	Learning Leadership: An investigation of principals' attitudes toward teachers in creating the conditions conducive for learning in school-based staff development.	UMSL
2007	Reinsch, E.	The Relationship Among Lifelong Learning, emotional intelligence and life satisfaction for adults 55 years of age or older	UMSL
2007	McManus, L.	The Instructional Perspectives of Community College Mathematics Faculty.	UMSL
2007	Rowbotham, M.	Teacher Perspectives and the Psychosocial Climate of the Classroom In a Traditional BSN Program	UMSL
2009	Ryan, L.	Adult Learning Satisfaction and Instructional Perspective in Foreign Language Classroom	UMSL
2010	Manjounes, C.	An Adult Accelerated Degree Program: Student and Instructor Perspectives And Factors That Affect Retention	LU
2011	Vatcharasirisook, V.	(Second Validation Study of Instrument) Organizational learning and employee retention: A focused study examining the role of relationships between supervisors and subordinates.	UMSL
2011	Jones-Clinton, T.	Principals as Facilitators Of Professional Development With Teachers As Adult Learners	UMSL
2011	Moehl, P.	(Third validation study of instrument) Exploring the relationship between Myers-Briggs Type and Instructional Perspectives Among College Faculty Across Academic Disciplines	UMSL
2012	Risley, L.	Exploring Congruency Between John A. Henschke's Practice and Scholarship.	LU
2013	Lubin, M.	Coaching The Adult Learner: A Framework for Engaging the Principals and Processes of Andragogy for Best Practices In Coaching.	VPU
2014	Gillespie, L.	Trust In Leadership: Investigation of Andragogical Learning and Implications For Student Placement Outcomes	LU
2014	Lu, Y.	An Exploration Of Merit Pay, Teacher and Student Satisfaction, and Teacher performance Evaluation From Instructional Perspective	UMSL
2014	Queen, V.	Practical Andragogy: Considering Instructional Perspectives of Hospitality Educators	SLU
2015	Lundry, S.	Transformational Learning: An Investigation Of The Emotional Maturation Advancement In Learners aged 50 and older	UMSL
2016	Hantak, K.	An Examination of Early Intervention Services, Family Outcomes, and Andragogical Factors	LU
2017	Najjar, H.	A Case Study: An Andragogical Exploration of a Collegiate Swimming and Diving Coach's Principles and Practices at Lindenwood University	LU

Note: Key: KSU- Kansas State University, UMSL- University of Missouri—St. Louis, LU- Lindenwood University, VPU- Virginia Polytechnic Institute and State University, (Northern Virginia Graduate Center), SLU- St. Louis University

I used the MIPI-EDS, which was a modified version of the MIPI. It was revised to fit

the needs of this particular study. It revolved around seven different factors: (a) Direct

supervisor's level of empathy with employees, (b) Direct supervisor's trust of employees,

(c) Planning and delivery of instruction, (d) Accommodating employee uniqueness, (e)

Direct supervisor's insensitivity to Employees, (f) Experience based learning techniques

(Employee-centered learning process), and (g) Direct supervisor's-centered learning

process.

Henschke's (1989) original IPI was used to measure the beliefs, feelings, and

behaviors of adult learners and their educators in academic settings. The MIPI-EDS was

adapted to fit the needs of this specific study in a corporate setting rather than an

academic classroom setting. The IPI Factors sheet and the Scoring Process sheet were

not adapted, but were still valid to use for this study.

Variables of the MIPI-EDS. Stanton (2005) inferred that "operational definitions

assign meaning to variables by specifying the actions or behaviors needed to measure the

variables" (p. 115). The seven factors used in the MIPI-EDS were used in a corporate

context. They were:

Factor 1: Supervisor's level of empathy with employees. Empathetic leaders or

teachers tended to respond to the learners learning needs. Empathic leaders paid close

attention to the development of a warm and bonding working relationship with

employees.

Factor 2: Supervisor's trust of employees. A relaxed and low-risk environment

is an important factor in establishing respect and trust. Respect and trust between the

supervisor and employees is created by avoiding threats, negative influences, and allowing employees to take responsibility for their learning.

Factor 3: Planning and delivery of instruction. Using an andragogical approach, the supervisors planned learning facilitation, which involved employees in the planning process. When employees take responsibility for their learning, they are committed to their success. Employees are also involved with their own evaluation. Feedback is included in the planning process.

Factor 4: Accommodating the employee uniqueness. Supervisors apply distinct learning facilitation techniques to each employee. All employees have their preferences in learning styles and methods. Supervisors consider employees' differences in motivation, self-concept, and life experiences for the subject to be learned.

Factor 5: Supervisor insensitivity towards employees. It is the behavior of the supervisor that influenced the learning climate. A lack of sensitivity and feeling also influenced the learning climate that an employee feels within the organization. When failure to recognize the uniqueness and effort of employees occurs, the bond of trust and mutual respect does not occur.

Factor 6: Experience-based learning techniques (Employee-centered learning process). The supervisor: focuses on group dynamics and social interaction so that employees apply the subject learned, according to what the supervisor has in mind. Employees need to play an active role in the work and learning process. Employees have different accumulated learning experiences and these lessons learn control is a major part of their learning.

Factor 7: Supervisor-centered learning process. The direct report took control

of the Learning. This was defined as student-centered process; it was the supervisor's

ability to communicate information as a one-way transmission from direct report to

employee. Employees had a passive role in the supervisor-centered process.

Table 4

Seven Factors of the MIPI-EDS Measurement Tool

Seven factors under MIPI-EDS	MIPI-EDS Items
1. Supervisor's level of empathy with employees	4, 12, 19, 26, 33
2. Supervisor's trust of employees.	7, 8, 16, 28, 29, 30, 31, 39, 43, 44, 45
3. Planning and delivery of instruction.	1, 9, 22, 23, 42
4. Accommodating employee uniqueness	6, 14, 15, 17, 37, 38, 40
5. Supervisor's insensitivity to Employees	5, 13, 18, 27, 32, 36, 41
6. Experience based learning techniques (Employee-centered learning process)	2, 10, 21, 24, 35
7. Supervisor-centered learning process	3, 11, 20, 25, 34

Note. (Henschke, 1989, 2016). Each question on the MIPI-EDS relates specifically to a factor. After the individual filled out the survey, it was scored on the "Scoring Process" sheet.

Validation of the IPI. The IPI was developed by Henschke in 1989. As seen in

Table 4, Henschke (1989) used factor analysis methodology to determine patterns and

validity in this measurement tool. After the factor analysis, all items not related to at

least one of the seven factors were dropped from the original tool. In the winter of 1989,

Henschke added more questions and submitted it to students during a winter semester of

a graduate adult education course, *Foundations of Adult Education,* conducted at the

University of Missouri — St. Louis. Results were used to support the content and

validity of the measurement tool (Henschke, 1989). "A measure has content validity to

the extent that items making up the measure are a representative sample of the domain of

items associated with the variable being measured" (Stone, 1978, p. 51). Those enrolled

in the 1989 *Foundations of Adult Education* course were asked specifically whether each

question in the IPI clearly reflected the factor that it was intended to measure. Henschke

(1989) noted that factors that received more than two 'No' student responses from the

group were removed from the instrument.

First reliability validation of the measurement tool. In 2005, Stanton set out to

provide construct validity to the original IPI. Stanton studied the internal consistency of

the MIPI and its validity by contrasting the MIPI and the Self-Directed Learning

Readiness Scale (SDLRS) (Stanton, 2005; Vatcharasirisook, 2011). In his study,

Vatcharasirisook asserted that internal consistency was a dependable method to measure

reliability, and a good way to test the tool's reliability was through the Cronbach's alpha

(2011). In Stanton's dissertation (2005), it was reported that "Landis and Koch (1977)

gave some benchmarks for reliability, 0.81-1.0 should be considered 'almost perfect,'

0.61 'substantial,' and 0.41- 0.60 'moderate'" (p. 210).

Table 5

Factors on the original IPI and Cronbach's Alpha

Factors on the original IPI	Cronbach's alpha
Teacher empathy with learners	0.63
Teacher trust of learners	0.81
Planning and delivery of instruction	0.71
Accommodating learner uniqueness	0.71
Teacher insensitivity toward learners	0.78
Learner-centered learning process	0.72
Teacher-centered learning process	0.57

Note. (Stanton, 2005)

It was shown in Stanton's (2005) research that Cronbach's alpha for the IPI was

0.8768 and was considered 'almost perfect' in reliability (p. 279). "The overall reliability

of the IPI (.8768) using all 45 items comprising the IPI is within the accepted range for a

new measurement tool" (Stanton, 2005, p. 211). Furthermore, Stanton's research

determined that "the two measurement tools (the IPI and the SDLRS) were not the same

concept (2005). Thus the IPI should be used in further studies" (Stanton, 2005, p. 279).

In 2005, Stanton was the first person to officially validate the IPI.

Since 2005, the MIPI was formally validated two additional times. The IPI was

found to be a valid and reliable measurement tool in identifying perspectives of adult

learners. The more people that use the modified versions of the IPI in the future, the

more opportunities it would have to be formally validated.

Second reliability validation of the measurement tool. Much like Stanton in

2005, Moehl (2011) used the Cronbach's alpha coefficient to determine the internal

consistency of the MIPI. In Moehl's (2011) study, there were two separate sets of

analyses conducted. One of the sets included all 426 cases, while the other set excluded

the 32 cases missing the number of years teaching. Table 6 provides a summary

comparing the two sets of analyses found in Moehl's (2011) study.

Table 6

Summary of Cronbach Alpha in Moehl's Study

	426 cases	394 cases
IPIf1: Teacher Empathy with Learners	.70	.69
IPIf2: Teacher Trust of Learners	.85	.85
IPIf3: Planning & Delivery of Instruction	.75	.75
IPIf4: Accommodating Learner Uniqueness	.72	.72
IPIf5: Teacher Insensitivity Toward Learners	.70	.70
IPIf6: Learner-Centered Learning Process	.70	.68
IPIf7: Teacher-Centered Teaching Process	.64	.65
Overall Instructional Perspectives Inventory	.90	.90

Note. (Moehl, 2011)

Moehl (2011) found there were no material differences between the two sets.

Moehl (2011) contended that "ideally, the Cronbach alpha coefficient of a scale should be

above .70. At .90, the overall Instructional Perspectives Inventory clearly demonstrates

internal consistency reliability" (p. 87).

Third reliability validation of the measurement tool. In 2011, Vatcharasirisook was the third to validate the IPI measurement tool. Vatcharasirisook noted:

In this study, 59 survey items were used to measure nine variables, seven exogenous variables and two endogenous variables. The seven exogenous variables are *Supervisor empathy with subordinates*, *Supervisor trust of subordinates*, *Planning and delivery of instruction*, *Accommodating subordinate uniqueness*, *Supervisor insensitivity toward subordinates*, *Subordinate-centered learning process*, and *Supervisor-centered learning process*. The two endogenous variables are *Employees' job satisfaction* and *Employees' intention to remain in the company*. (Vatcharasirisook, 2011, p. 63)

Table 7

Reliability of the Seven Subscales

Subscale	Cronbach's alpha
Supervisor empathy with subordinates	0.83
Supervisor trust of subordinates	0.86
Planning and delivery of instruction	0.79
Accommodating subordinate uniqueness	0.79
Supervisor insensitivity toward subordinates	0.74
Subordinate-centered learning process	0.76
Supervisor-centered learning process	0.71
Employee's job satisfaction	0.79
Employee's intention to remain in the company	0.85

(Vatcharasirisook, 2011)

Much as Stanton (2005) and Moehl (2011) previously had done, Vatcharasirisook (2011) worked to ensure reliability and validity of the instrument used and a Cronbach's alpha and a factor analysis were conducted. "The factor analysis was to confirm the validity of the instrument" (Vatcharasirisook, 2011, p. 63). Once more, using the validity test and a factor analysis, Vatcharasirisook (2011) "demonstrated all factor loadings

exceeded the criteria of 0.30 . . . the reliability test, using Cronbach's alpha test verified

good reliability for all subscales that the Cronbach's alpha for an individual subscale

exceed the criteria of 0.70" (p. 70).

After being formally validated in three dissertations, and used in 22 dissertations,

the measurement tool has been proven to have consistent results over and over again.

The IPI or the MIPI would continue to prove validity and consistent results in future

dissertations as well.

Usage of the MIPI-EDS in the workplace. In 2016, I sought out Henschke, the

creator of the IPI, in order to gain permission to use it for this study. It was used in

combination with a series of other questions to explore the levels of trust and empathy

that employees felt that they have in their own supervisors. At this point, it was clear that

this measurement tool was used multiple times in adult education classes, but had been

used only a few times in an environment other than in an academic setting. In 2011,

Vatcharasirisook applied this measurement instrument to the hospitality, healthcare, and

banking industries in Thailand. In 2014, Queen used this measurement tool to examine

the perceptions of hospitality educators. I saw this as an opportunity to gain perspective

on levels of job satisfaction, as well as how length of service may impact levels of

employee job satisfaction.

Part III of research design. I designed Part III as such in order to determine why

employees who were with an organization longer than 5 years stayed with the

organization. In order to be consistent with Henschke's MIPI-EDS, measurement in this

study consisted of 20 Likert style questions and seven opened-ended questions.

In order to analyze the questions, I presented, it was important to compile all three of parts into one survey-questionnaire. I was fascinated with how employee retention and turnover impacted an organization over a period of time. While Henschke's (2016) MIPI-EDS measured the feelings and beliefs, the open-ended questions allowed the participants the opportunity to provide a qualitative form of data that supported and validated the MIPI-EDS. In order to determine some of the answers to my research inquiry, I developed these two hypotheses and three research questions.

Null Hypotheses and Research Questions

I analyzed two null hypotheses and two research questions:

Null H$_1$: There is no relationship between the supervisor's factors identified by the data collected on the employee's MIPI and the employee's length of service to the organization.

Null H$_2$: There is no relationship between the supervisor's factors identified by the data collected on the employee's MIPI and the level of job satisfaction that an employee feels within his or her job role.

RQ1: Why have employees within the PBS division of SSM Health who have been employed within this organization for more than five years chosen to remain within the PBS division of SSM Health?

RQ2: What, if any, common themes are related to the perceived level of job satisfaction of the employees who have been with the organization more than five years?

RQ3: What, if any, trends could be identified from the experiences of past employees?

There were a number of reasons this study was significant. First, it allowed an established organizational culture to be explored thoroughly. It also worked to continually developed an organization's most valuable resource: their employees. This particular research design was significant because it specifically focused on the perceptions that employees had of their direct supervisors. It was my hope that regardless of the results, the qualitative portion of the survey-questionnaire aligned with the quantitative portions of the research design. I wanted to prove the perceptions of the employees' relationships led to retention issues and high turnover rates within organizations. Lastly, the study was significant because it was a mixed-method study. There were a number of quantitative studies that studied the relationships of employees and their supervisors. The MIPI-EDS was a validated resource in determining the trust, empathy, and sensitivity factors of direct supervisors, determined by their employees, throughout a pool of people. The questionnaire portion of the survey was used to gather the qualitative data needed for this study.

Participants

This study was only open to SSM employees who worked in specific departments under the PBS division. The pool of people the survey and questionnaire was open to was 448 people then-currently employed within those sections of the PBS division. This survey was not available to every department within the PBS division, due to the suggestion of the Vice President of the PBS division. According to the Vice President of the PBS division, there could have potentially been competing conflicts, and the integrity of the study could have been at risk if it was opened up to the entire PBS division. Per his recommendation, this study was only available to 448 people within the PBS division.

For the quantitative portion of the research study, Fraenkel et al. (2012) anticipated that roughly 8% to 10% of the people offered the opportunity would participate in the study (p. 103). I was optimistic there would be more than 8% to 10% of the total population. After the survey-questionnaires from participants were collected, there were 100 individuals who participated in Parts I and II. Out of the 100 individuals who participated in Parts I and II, 49 individuals opted to participate in Part III as well.

The qualitative portion of the study was more selective as to who was offered the opportunity to complete the final portion of the research study. Part III was only available to those within the pool of 448 people who had completed Parts I and II, and who had been with the organization for longer than five years. It was unknown at the time of presenting the three-part research design how many people were applicable and how many chose to participate in the questionnaire portion of the research study. Since it was unknown as to how many people worked at the organization for more than five years, I decided to accept a random convenience sample between 15 and 50 of the completed and validated questionnaires from within the pool of 448 people of the PBS division of SSM Health.

There were 17 different departments from the PBS Division of SSM recruited to participate in this research study. While SSM Health had facilities in the states of Missouri, Illinois, Wisconsin, and Oklahoma, all of the potential participants of this study resided in the St. Louis, Missouri, or Southern Illinois regions. Those departments were: (a) 3rd Party Collections (SIL Follow-up), (b) 3rd Party Collections (TPL/WC), (c) Cash Applications, (d) CBO Leadership, (e) Claims Review Specialist, (f) Commercial Claims Processing, (g) Commercial Follow-up, (h) Customer Service, (i) Government Claims

Processing, (j) HBP (Hospital Based Providers), (k) Medicaid Follow-Up, (l) Medicare Follow-Up, (m) Operations Support, (n) PSC Leadership, (o) Pre-registration, (p) Pre-service, and (q) Self-Pay.

The total number of people in these departments were approximately 458 people. Of those 458 employees, 10 were temporary employees and were not eligible to participate in the three-part research design, because they were not assigned email addresses by the organization. The three-part research design was not tampered with or edited purposely to include them; they were removed from the total pool of people prior to the start of the survey questionnaire.

Research Procedures

Learning within organizations does not occur unless there is organizational trust. In order to determine answers to the hypotheses and the research questions, every step of this process was planned. Although there were definite tribulations identified throughout the process that required attention and creative solutions, any procedures modified or adjusted were changed to allow fairness, and to retain the integrity of the study throughout the whole process.

Beginning stages of the research study. Initially, I sought out a team of people that would be valuable due to their experience. Each individual on my doctoral committee brought extensive knowledge, and experience that would be beneficial to my research. Each person was different in style, background, knowledge, and expertise, but each person added something that was not present on the team previously.

Prior to finalizing the hypotheses or research questions, I decided to use an organization in the field of healthcare as the focus of my study, and I wanted to explore

why long-term employees stayed with their organizations over many years. After serious

consideration, I saw a great deal of value in Henschke's (2016) MIPI. I thought that by

potentially using both the MIPI and a series of developed questions about the employees'

job-related experiences, insight into employee retention and turnover could be gained as

well as answering why employees opted to stay within this organization. It was during

this time frame that I created a plan of action for this research project. Not long after I

decided that using a healthcare facility would be beneficial, I preliminarily discussed the

possibility of the research project being conducted within my own facility, with the

support of my direct supervisor and department leadership, I proceeded with the project.

After the preliminary discussions with the division's leadership, I sought out Dr.

Henschke to gain permission and formal approval to develop a modified version of the

IPI, the MIPI-EDS, so it could be used in a format that compiled with my questions, as

well as could be distributed electronically. Shortly after gaining formal approval from

Henschke, I obtained approval from both Lindenwood University and SSM Health's

Internal Review Boards (IRB), as receiving formal approval from all applicable IRBs is a

necessary requirement before conducting research.

After approval from both IRBs, I was granted formal permission from the study

site to have preliminary conversations with the supervisors, managers, and directors from

the 17 different departments that the study applied to, in order to inform them that there

was going to be a research study performed. I also gave an opportunity to answer any

possible questions. The direct supervisors from the 17 departments were informed about

the study, and they were given resources if they or if any of their employees had

questions at any phase of this process.

Although I had not been with SSM Health even a full year, I wanted to remove

any sort of conflict of interest that could be determined. I also wanted to ensure that the

survey questionnaire offered the safest way for employees to answer potentially

controversial questions about their direct reports. I removed all potential buffers so that

the employees could speak freely and provide insight that could lead to more research at

a later time. In order to do this, I appointed a research assistant, whose primary function

was to de-identify all information gathered. My research assistant was chosen

specifically because of a prior working relationship with me, as well as for the

representative's knowledge of research integrity. My research assistant was also

specifically chosen because he had no previous relationship with either Lindenwood

University or with SSM Health, and was completely neutral and unbiased. During the

time of the study, the research assistant also served as a liaison between myself and the

staff at the study site throughout the study and after the study was conducted. As my

research assistant dealt with sensitive data and a sensitive topic, the representative

complied with all requests from both Lindenwood University and SSM Health, just as I

did.

After gaining formal approval from both IRBs, my research assistant and I created

a Google email account that was used specifically for correspondence with employees, or

their direct supervisors, and distributed the survey questionnaire through Google Docs. I

ensured that as much information as possible was kept private and confidential. By

creating a specific Google email account, I had no access to any person's identifying

information. Once the initial survey-questionnaire was developed in Google Docs, the

password was changed by the research assistant so that only the research assistant would

have access to the data with any sort of identifying information.

The Researching Process

I understood that numbers of new hires fluctuated within this division. In order to

obtain the most accurate number of employees who could potentially take this survey-

questionnaire, I made arrangements, with the Human Resources department of SSM

Health to send the most accurate list of employees directly to my research assistant just

days prior to the week of opening of the survey questionnaire for response.

Because I was aware that Google had a restriction of only being able to send out

300 emails per day, I planned for this in advance by making it part of the initial

procedural plan. I decided that for employees with last names A through M the survey

questionnaires would be sent out on one day, and for those with last names M through Z

survey questionnaires would be sent out the very next day. My research assistant sent out

an informational email with the consent form prior to sending survey questionnaires.

The initial plan was to send out all of the survey-questionnaires through Google

Docs in one day. After a bit of research, it was determined that it was, in fact, not a

possibility. While I knew about the restrictions on how many emails could be sent out, I

was not aware of the restriction also placed on how many Google Docs could be sent out

in one day. After the first 100 were sent out, it was determined that only 100 survey

questionnaires could be sent out through Google at one time. My research assistant

distributed 100 per evening until the last set had been sent. It took a period of five days

to fully distribute all of the survey questionnaires. Since the first 100 were distributed on

a Wednesday, all of the survey questionnaires were completely distributed by the

following Monday.

I allotted a span of four weeks for participants to take the survey-questionnaire.

The survey-questionnaires were originally set to be sent out on March 1, 2017. Because

of the delay caused by the restriction in Google Docs, the close of the survey was Friday,

April 7, 2017. It was extended four days longer than originally planned because I wanted

to ensure that the participants had adequate time to take the survey questionnaire. During

the four weeks allotted, my research assistant sent out two reminder emails on behalf of

myself.

Out of the entire pool of people who could have chosen to participate in Parts I

and II, only a maximum convenience sample of the first valid and completed 100

responses were accepted and analyzed. Out of the employees who had been with the

organization longer than five years and opted to complete Part III of the survey-

questionnaire, a maximum of 50 complete and valid survey questionnaires could have

potentially been accepted and analyzed. After the process was completed, 102 people

chose to participate in Parts I and II. Out of those 102 people, 51 also participated in Part

III. After analyzing the survey-questionnaires for completion and validity, two

individuals' responses, who had participated in all three parts, were deemed invalid

because those participants failed to answer all the questions asked and were pulled from

the analyzed data. At completion of the data analyzation, there were 100 total

participants, and 49 had participated in all three parts of the study.

At the end of the allotted time frame, the link to the Google Doc was closed by

the research assistant to all potential participants. At this time, my research assistant

reviewed all of the survey-questionnaires to ensure that all were de-identified. The demographics were still included in the data, but all names were removed prior to submission to me.

In order to analyze the data to better answer the hypotheses and research questions, I analyzed null hypotheses 1 and 2 by using a Pearson Product Moment Correlation Coefficient (PPMCC) and I analyzed the data per research question for common themes. I used the Instructional Perspectives Inventory Factors sheet and Scoring Process sheet to individually score each of the MIPI-EDS results. Both of these pieces are attached in the Appendix section of this dissertation. Neither of the sheets used to score the MIPI-EDS were modified.

The first piece of data analyzed was to determine whether there was a relationship between the factors identified on the employees' MIPI-EDS and the employees' length of service. In order to analyze the data to determine the answer to the second hypothesis question, I needed to examine the single question in the demographics section that focused directly on job satisfaction. How an individual answered that question could have possibly predicted how an employee scored his or her direct supervisor on the MIPI-EDS portion of the study. In order to analyze the research questions, I only analyzed those 49 employees who had been with the organization more than five years. There was a series of open-ended questions for which data were collected and analyzed for common themes.

Research Question 3 went unanswered. After receiving approval to request the exit interviews from Human Resources, I was denied access to them. Because of the miscommunication, I deemed the answer to that research question was inconclusive.

I was pleased overall with how smoothly the process of data collection went.

Every trial or tribulation that was determined during the process was able to be quickly

modified and adjusted to maintain the integrity of the study in a timely and effective

fashion. The three-part research study allowed me to gain perspective in ways that were

not expected or known.

Chapter Four: Results

In order to properly analyze the null hypotheses or research questions, there was a major synthesis of the data collected. In order to adequately discuss the data provided, I separated Chapter Four into four major sections: (a) Participant and demographics of the Population, (b) Hypotheses Questions, (c) Research Questions and (d) Additional Themes Found Within the Research. While I was able to discuss all four of these areas, there were unexpected results in the data.

Null Hypotheses and Research Questions

I analyzed two null hypotheses and two research questions:

Null H₁: There is no relationship between the supervisor's factors identified by the data collected on the employee's MIPI and the employee's length of service to the organization.

Null H₂: There is no relationship between the supervisor's factors identified by the data collected on the employee's MIPI and the level of job satisfaction that an employee feels within his or her job role.

RQ1: Why have employees within the Patient Business Services (PBS) division of SSM Health who have been employed within this organization for more than five years chosen to remain within the PBS division of SSM Health?

RQ2: What, if any, common themes are related to the perceived level of job satisfaction of the employees who have been with the organization more than five years?

RQ3: What, if any, trends could be identified from the experiences of past employees? As discussed in Chapter Three, data for RQ3 was unexpectedly unavailable for analysis. Details are provided later in Chapter Four discussion.

Participants and Demographics of the Population

While SSM Health had PBS employees throughout Missouri, Illinois, Wisconsin, and Oklahoma, all of the departments I chose to invite to participate in this research study resided in Missouri and Illinois, there were no participants from Wisconsin or Oklahoma.

Survey-questionnaires were distributed via Google Docs to a total of 448 people throughout 17 different departments. By the end of the allotted research study time frame, 102 people out of the 448 participated in Parts I and II of the research study. The overall response rate from Part I and Part II of the survey questionnaire was 22.7% of the total people polled. Figure 4 displays the responses rate from participants who submitted complete and valid surveys.
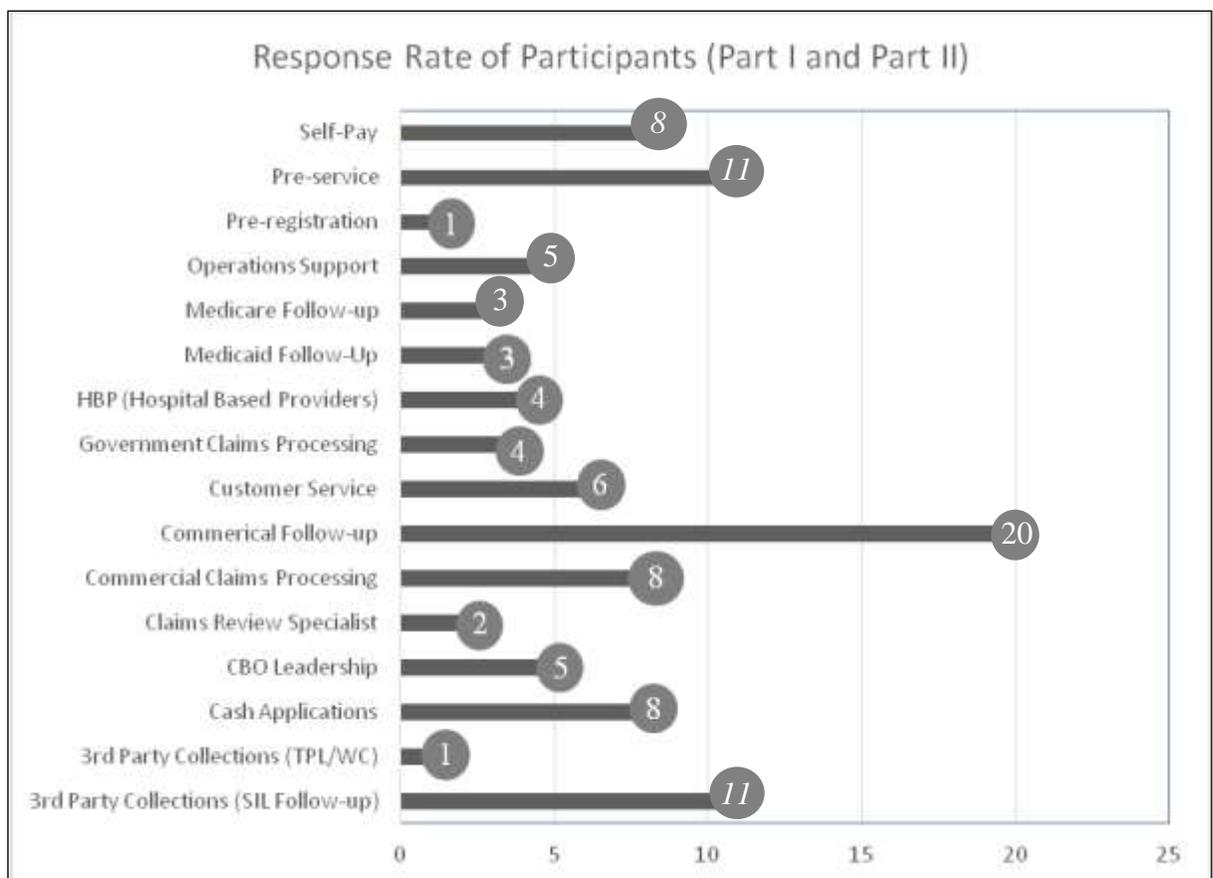
Figure 4. Response rate of participants (Parts I and II).

Out of the 102 participants, 51 completed all three parts of the research study. After reviewing the results for completion and validity, two of the 102 survey questionnaires were deemed incomplete and were removed from the remainder of the results, because the participants had left all of the open-ended questions unanswered. After reviewing the data for completion and validity, there were exactly 100 total participants, and 49 of those 100 individuals were long-term employees who had been with the organization longer than five years. Each survey-questionnaire was coded with an individual code. The demographic that explains how many of the participants were eligible to participate in Parts I and II, and the individuals who were able to participate in Part III can be seen in Figure 5.
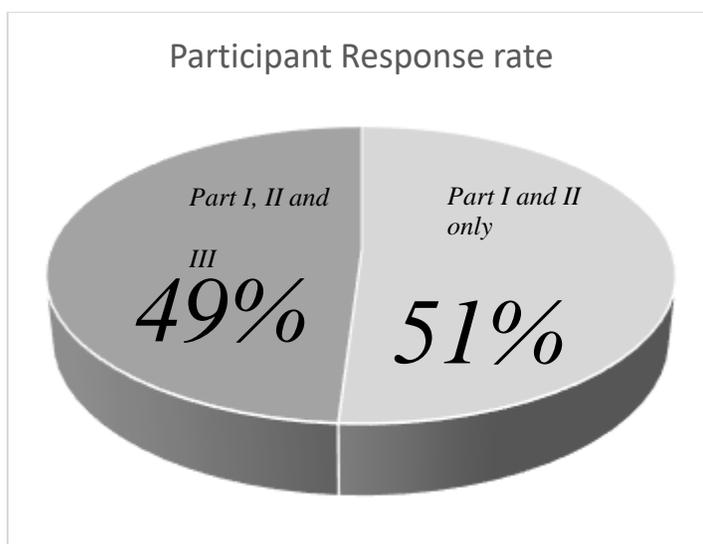
Figure 5. Participant response rate (Parts I, II, and III).

As displayed in Figure 6, out of those who chose to participate, most of them were women. In fact, of the participants, 92% of the participants were women and 8% were men. "The healthcare industry is powered by women" (Diamond, 2014, Para. 1). This was not surprising because it was commonly recognized that the field of healthcare was comprised predominately of women. Diamond (2014) estimated that approximately

80% of healthcare providers are women (Para. 5). This specific demographic aligned

with the national demographic of women to men in the field of healthcare.
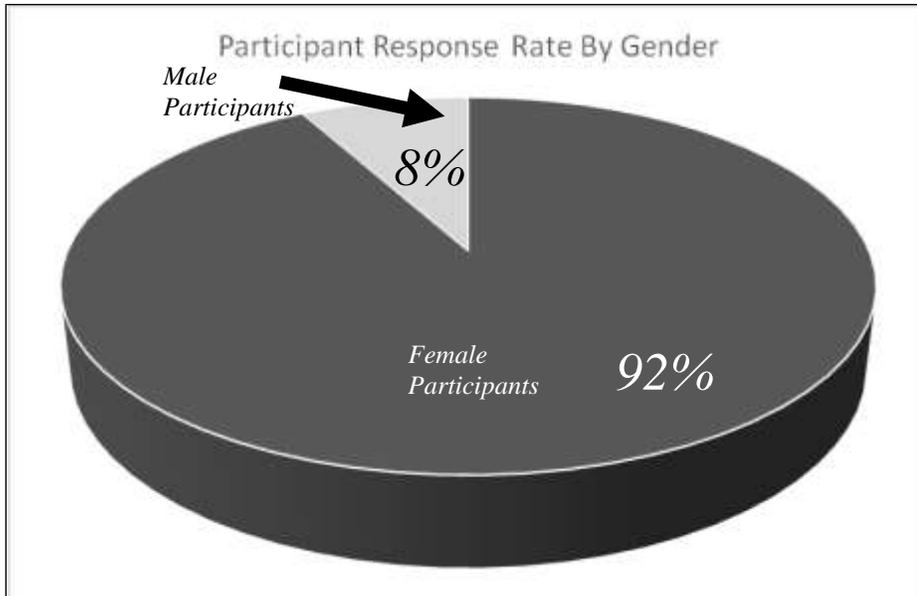
Figure 6. Participant response rate by gender.
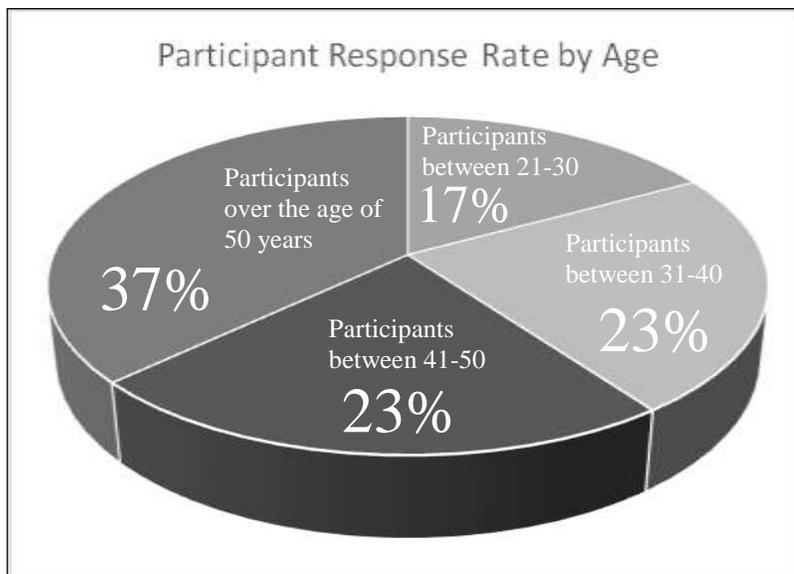
Figure 7. Participant response rate by age.

Of the participants, zero individuals were under the age of 21 years old, as displayed in

Figure 7. There were 17 participants 21 to 30 years of age. There were 23 participants

between 31 to 40 years of age. There were 23 participants who were between 41 to 50

years of age. The largest age group of participants was the group that was over the age of

50 years. There were 37 people who were over the age of 50. Figure 8 provides a

summary of the participants' level of education.
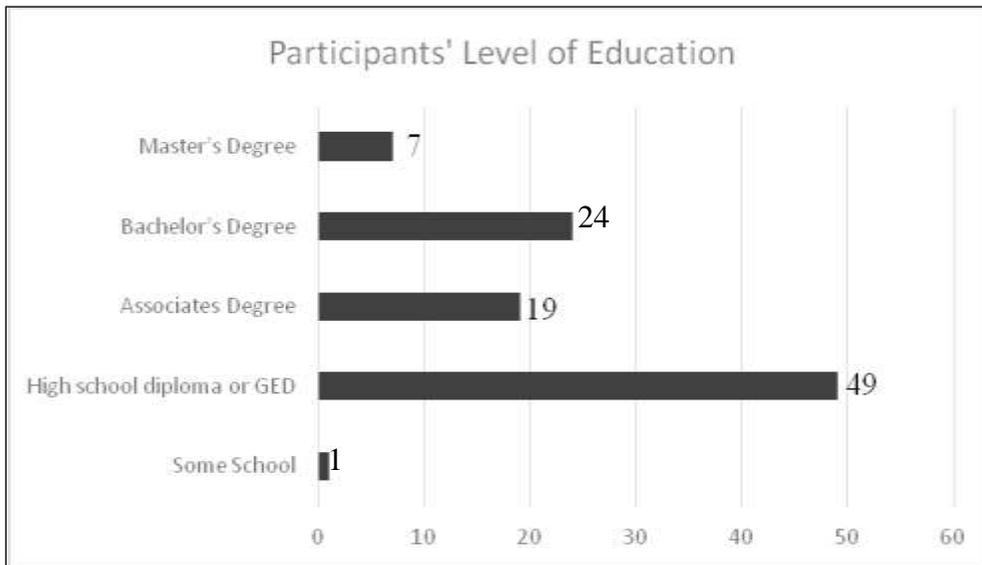
Figure 8. Participants' level of education.

Only one person chose the option of 'Some School.' Of the participants, 49 had a

high school level of education and graduated with a high school diploma or obtained a

General Equivalency Diploma (GED). Of the participants, 19 people had an Associate's

Degree. Out of the participants, 24 people have a Bachelor's Degree. Lastly, seven

people replied that they had earned a Master's Degrees.

Participants were asked to provide their work status, with regard to full-time or

part-time employment. Of all of those who opted to participate in the study, 99% of the

employees were full-time employees. Only one participant was a part-time employee.

Figure 9. Work status of participants.

Figure 10 displays participants' level of job satisfaction. When asked to identify their current level of job satisfaction, 24 participants stated that they 'very satisfied with' their jobs.
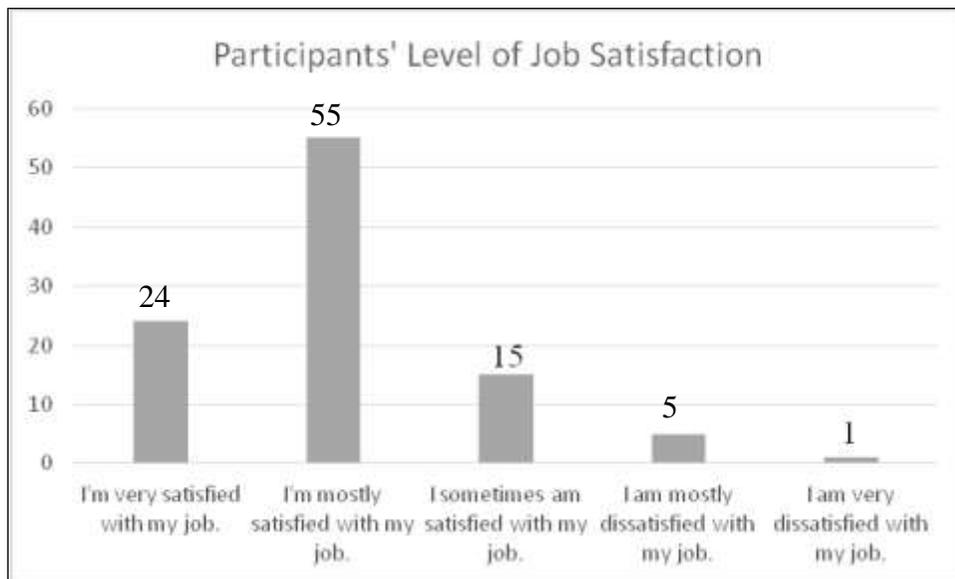
Figure 10. Participants' level of job satisfaction

Of those who participated, 55 stated that they were 'mostly satisfied with' their jobs.

Fifteen participants stated that they were 'sometimes satisfied' with their job. Five of

those participants stated that they were 'mostly dissatisfied with their job.' Only one

person stated that he or she was 'very dissatisfied with' his or her job.

Figure 11. Employee length of service

As displayed in Figure 11, of those who participated in the survey-questionnaire,

19 people had been with the organization less than one year. Of the participants, 32

people had been with the organization between 1 and 5 years. Of the participants, 24

people had been with the organization between 5 and 10 years. Only five people had

been with the organization between 10 and 15 years. Nine individuals had been with the

organization between 15 and 20 years, and 11 people had been with the organization for

more than 20 years.

The first unexpected result was the participant response rate. When this project

was initiated, it was mentioned in passing by a peer of mine that achieving the minimum

number of participants was going to be difficult, because there were a number of people

who expressed a lack of trust surveys when the previous surveys were given. Because I

was informed in multiple conversations that there had been incidents previously that may

have caused mistrust, I took all precautionary means possible to protect the integrity of

the study. Even those in leadership positions expressed sincere doubt that their

employees would willingly participate in the study. Because of this, I was concerned

about setting a minimum and maximum number for the sample size. For Part I and Part

II, the quantitative portion, there was a minimum of 25 individuals and a maximum of 100 who could have opted to participate in the research study. For Part III, the qualitative portion, there was a minimum of 15 individuals and a maximum of 50 participants who had the option to participate in the research study. After the completed and validated surveys were analyzed, it was determined that the maximum number of participants was accepted for the quantitative, portion and the qualitative portion came within one degree of the maximum number that was pre-determined at the beginning of the research study.

Null Hypotheses Analysis

When developing the hypotheses, I chose to specifically focus on the employees' length of service and levels of job satisfaction. SSM Health had a proud legacy story that was passed down to all new employees. It was also proud of its mission and values. After extended contemplation, I wanted to gain insight, not as to why people left their organizations, but why they chose to stay with their organizations over a period of time. The null hypotheses were:

Null H$_1$: There is no relationship between the direct supervisor's factors identified by the data collected on the employee's MIPI and the employee's length of service to the organization.

Null H$_2$: There is no relationship between the direct supervisor's factors identified by the data collected on the employee's MIPI and the level of job satisfaction that an employee feels within his or her job role.

I broke down the data provided by the participants in order to make general conclusions.

Null H₁. In Part I of the research study, there was a specific question asked about the employee's length of service. The question and responses were:

How long have you been working at SSM?

1) Less than one year

2) Between 1-5 years

3) Between 5-10 years

4) Between 10-15 years

5) Between 15-20 years

6) More than 20 years

After the MIPI-EDS score sheets were scored and recorded for each participant, each participant's responses were analyzed against each individual's score on each of the seven factors on the MIPI-EDS.

Table 8

Summary of Correlations for Null Hypothesis 1

Factors of the MIPI-EDS	Length of Service
Factor 1: Level of Supervisor Empathy with Employees	Not Correlated
Factor 2: Perceived level of supervisor's trust of employees	Not Correlated
Factor 3: Perceived level of planning and delivery of instruction	Not Correlated
Factor 4: Perceived level of accommodating employee uniqueness	Not Correlated
Factor 5: Perceived level of supervisor's insensitivity towards learners	Not Correlated
Factor 6: Experienced Based Techniques	Not Correlated
Factor 7: Direct Report-centered learning process	Not Correlated

In order to be analyzed properly against each individual's score on each of the seven factors found on the MIPI-EDS, questions were assigned Likert-scale values. After the questions were assigned Likert-scale values, they were analyzed against each of the seven factors to determine if there was a relationship between the employee's length of service and any of the seven factors.

In all of these factors, there was no correlation between an individual's length of service and his or her perceptions identified on the MIPI-EDS. The results for each individual test were:

Factor 1: The analysis revealed that the participants' Length of Service scores and their perceptions of Employer Empathy on the MIPI were not correlated, $r(98) = 0.028$, $p = .7821$ (r-critical $= .195$; $\alpha = .05$); null hypothesis was not rejected.

Factor 2: The analysis revealed that the participants' Length of Service scores and their perceived level of Supervisor's Trust of Employees on the MIPI were not correlated, $r(98) = -0.071$, $p = .4827$ (r-critical $= .195$; $\alpha = .05$); null hypothesis was not rejected.

Factor 3: The analysis revealed that the participants' Length of Service scores and their perceived level of Planning and Delivery of Instruction (by the direct report) on the MIPI were not correlated, $r(98) = 0.003$, $p = .9764$ (r-critical $= .195$; $\alpha = .05$); null hypothesis was not rejected.

Factor 4: The analysis revealed that the participants' Length of Service scores and their perceived level of Accommodating Employee Uniqueness (by the direct report) on the MIPI were not correlated, $r(98) = -.100$, $p = .3222$ (r-critical $= .195$; $\alpha = .05$); null hypothesis was not rejected.

Factor 5: The analysis revealed that the participants' Length of Service scores and their perceptions of Employer Empathy on the MIPI were not correlated, $r(98) = .043$, $p = .6710$ (r-critical = .195; $\alpha = .05$); null hypothesis was not rejected.

Factor 6: The analysis revealed that the participants' Length of Service scores and their perceptions of Experienced Based Techniques (employee-centered learning process) on the MIPI were not correlated, $r(98) = 0.026$, $p = .7974$ (r-critical = .195; $\alpha = .05$); null hypothesis was not rejected.

Factor 7: The analysis revealed that the participants' Length of Service and their perceived level of Supervisor-Centered Learners on the MIPI were not correlated, $r(98) = 0.083$, $p = .4117$ (r-critical = .195; $\alpha = .05$); null hypothesis was not rejected.

The results for the first hypothesis question offered unexpected results found in the data. Initially, it was the suspicion of mine that if people felt levels of empathy, trust, and sensitivity from their direct reports, they stayed with their organization longer. This data did not match my assumption at all. In fact, it was the opposite. In conclusion, I failed to reject Null Hypothesis 1.

Null H₂: For Null H_2, I wanted to determine if there was any relationship between the direct supervisor's factors identified by the data collected on the employee's MIPI-EDS and the level of job satisfaction that an employee felt in his or her job role. Much like I analyzed the first hypothesis for the first question, I analyzed the second question. In Part I of the research study, there was a specific question that asked the participants to rate their level of current job satisfaction. The question and responses were:

How would you describe your current job satisfaction?

1) I am very dissatisfied with my job.

2) I am mostly dissatisfied with my job.

3) I sometimes am satisfied with my job.

4) I am mostly satisfied with my job.

5) I am very satisfied with my job.

After the MIPI-EDS had been completely scored and recorded for each participant, the

score for each perceived factor was analyzed against the individual's rated level of job

satisfaction. In order to be analyzed properly against each individual's score on each of

the seven factors found on the MIPI-EDS, this question was also given Likert-scale

assigned values. After this question was assigned Likert-Scale values, it was analyzed

against each of the seven factors to determine if there was a relationship between the

employee's perceived level of job satisfaction and any of the seven factors.

Table 9

Summary of Correlations for Null Hypothesis 2

Factors of the MIPI-EDS	Level of Job Satisfaction
Factor 1: Level of Supervisor Empathy with Employees	Correlated
Factor 2: Perceived level of supervisor's trust of employees	Correlated
Factor 3: Perceived level of planning and delivery of instruction	Correlated
Factor 4: Perceived level of accommodating employee uniqueness	Correlated
Factor 5: Perceived level of supervisor's insensitivity towards learners	Not correlated
Factor 6: Experienced Based Techniques	Correlated
Factor 7: Direct Report-centered learning process	Correlated

In almost all of the factors, the perceived level of job satisfaction identified by the participants was directly correlated to the factors identified on the MIPI-EDS. The results for each individual test were:

Factor 1: The analysis revealed that the participants' level of Job Satisfaction scores and their perceptions of Employer Empathy on the MIPI were significantly correlated, $r(98) = .441$, $p < .0001$ (r-critical = .195; $\alpha = .05$); null hypothesis was rejected.

Factor 2: The analysis revealed that the participants' level of Job Satisfaction scores and their perceived level of Supervisor's Trust of Employees on the MIPI were significantly correlated, $r(98) = .477$, $p < .0001$ (r-critical = .195; $\alpha = .05$); null hypothesis was rejected.

Factor 3: The analysis revealed that the participants' level of Job Satisfaction scores and their perceived level of Planning and Delivery of instruction (by the direct report) on the MIPI were significantly correlated, $r(98) = .444$, $p < .0001$ (r-critical = .195; $\alpha = .05$); null hypothesis was rejected.

Factor 4: The analysis revealed that the participants' level of Job Satisfaction scores and their perceived level of Accommodating Employee Uniqueness (by the direct report) on the MIPI were significantly correlated, $r(98) = .362$, $p = .0002$ (r-critical = .195; $\alpha = .05$); null hypothesis was rejected.

Factor 5: The analysis revealed that the participants' level of Job Satisfaction scores and their perceptions of their Supervisor's Insensitivity towards learners Empathy on the MIPI were not correlated, $r(98) = .045$, $p = .6566$ (r-critical = .195; $\alpha = .05$); null hypothesis was not rejected.

***Factor 6*:** The analysis revealed that the participants' level of Job Satisfaction scores and their perceptions of Experienced Based Techniques (employee-centered learning process) on the MIPI were significantly correlated, $r(98) = .383$, p = .0001(r-critical = .195; $\alpha = .05$); null hypothesis was rejected.

***Factor 7*:** The analysis revealed that the participants' level of Job Satisfaction scores and their perceived level of Supervisor-Centered Learners on the MIPI were significantly correlated, $r(98) = -0.376$, p < .0001 (r-critical = .195; $\alpha = .05$); null hypothesis was rejected.

The results for the second hypothesis offered a great deal of information that was both valid and comparable to both Stanton's (2005) and Vatcharsirisook's (2011) MIPI usage. In 2011, Vatcharasirisook found that the perceived levels of employee satisfaction were directly connected to the levels of trust and empathy that the employee perceived the supervisor had. Vatcharasirisook (2011) determined that the higher the employee rated their supervisor in the areas of trust and empathy, the more satisfied the employee tended to be in his or her job. Prior to the start of this project, in a casual conversation, Henschke and I also predicted that the levels of perceived trust (Factor 2) would have the highest correlation to the employees' rated level of job satisfaction. The seven factors significantly correlated to the employee's rated level of job satisfaction, except Supervisor's Insensitivity towards learners. The level of correlation between perceived level of trust and employees' rated level of job satisfaction was also the most significant correlation. In conclusion, I rejected Null Hypothesis 2. There was a direct correlation between the amount of trust that the employee perceived his or her direct supervisor to have and the employees' level of job satisfaction.

Research Question Analysis

I presented a number of literature pieces that identified why employees chose to leave their organizations. While there was a great deal of literature that focused on why people chose to leave their organizations, there was little literature that discussed why employees chose to remain with their organizations over long periods of time. In order to determine any possible answers, I made the qualitative portion only open to long-term employees who had stayed within the organization for over five years. There were 49 responses out of the 100 utilized for this portion of the research. Since all of the data had been de-identified prior receiving any data, all of the participants were coded with numbers 1-100. Prior to initiating this study, I made the assumption that people stayed with SSM Health because of the mission and the values, as SSM Health's mission focuses on a diverse legacy of caring for the sickest and poorest people in need. SSM Health was proud of its traditions and founding story. The mission statement was consistently taught in all training classes within the PBS division and the mission statement was visibly displayed in multiple areas of each SSM Health facility. While some of the responses gathered within the data were expected, there were additional unexpected results found in both research questions.

Research Question 1

Research Question 1 specifically focused on why long term employees chose to remain in this organization, specifically the PBS division. In order to fully answer this question, I looked specifically at two of the questions on the questionnaire portion of the three-part research study. Those two questions were: 'Why have you chosen to remain with this division of the organization as long as you have?' and 'Do you intend on

working for this organization three years from now?' When asked the previous questions

directly, the long term employees provided answers that could be categorized as:

Table 10

Why People Have Chosen to Remain at SSM Health Over 5 years

Peer Impact
Relationship with Direct Supervisor
Genuine Happiness/intrinsic motivation
Salary, Benefits, and Schedule
Mission, Values, and Legacy
Opportunities for Growth
Feeling of being stuck
Comfort in One's Job or Environment

While most of the responses indicated that the individuals who chose remain with

this organization were positive, there were also negative responses. The number of

positive responses outweighed the number of negative responses.

Peer impact. The category of 'peer impact' was the most unexpected result found.

The study focused on the relationships that individuals had with their supervisors, but I

overlooked the impact that peers had on people in a workplace environment. There was a

significant amount of responses that led me to determine that the social environment of

the culture played a major role in whether an employee chose to remain with the

organization. Some of the responses included:

"Of course in the great scheme of things, we are all replaceable, but this place

makes one feel important and needed . . . we all make a difference together . . . we

all serve a purpose here" (Participant #5).

"My co-workers are outstanding" (Participant #10).

"We're like a family" (Participant #10).

"[I have a] great work family" (Participant #12).

"[There is a] great family-like atmosphere" (Participant #13).

"Everyone is always supportive and pushing me to be and do my best"

      (Participant #34).

"I am 'finally' a round peg in a round hole! I love my co-workers" (Participant

      #36).

"It is a great place to work — there are great people and it's a great environment!"

(Participant #37).

"I have some very good friends here" (Participant #38).

"[I stay because of] the co-workers" (Participant #43)

"[I greatly appreciate my] co-workers . . . we are family . . ." (Participant #48)

"I enjoy the staff" (Participant #53).

"I feel like I contribute to my team" (Participant #57).

"I enjoy my job and the people I work with" (Participant #82).

There were more responses to this category than any other category found within the

responses. This revelation was the biggest surprise found in the data.

    Relationship with direct supervisor. The second category was 'relationship with

direct supervisor.' This is the category that I initially had the most interest in. I was

curious as to whether the commentary reflected would be as apparent as the results of the

MIPI-EDS. Some of the responses were:

"I adore my supervisor!" (Participant #5).

"[I have a] good boss" (Participant #7).

"I love my supervisor . . . mostly my supervisor and her work ethics [are why I

      have stayed.]" (Participant #10).

"My supervisor makes the work environment meaningful. We are blessed to have

such a supportive, open-minded and caring supervisor" (Participant #10).

"If I need advice or assistance, I can ask for it and my voice will be heard . . . my

supervisor has my back" (Participant #25).

"[I thoroughly enjoy] my supervisor" (Participant #36).

"I greatly appreciate my bosses" (Participant #48).

"I work well with my supervisor" (Participant #85).

Prior to receiving the results, I anticipated receiving more commentary that pertained

directly to the relationship employees had with their supervisors as to why individuals

chose to remain with their facilities. I thought that the number one reason that people

chose to remain with their organization was going to be the relationship they had with

their supervisor. That was not the case. The responses received regarding the

relationship employees had with their supervisors had the second highest amount of

responses. It was no surprise that employees chose to reference their direct supervisors.

The unexpected result was reflected when I realized that this was not the question that

received the highest number of responses from participants.

Genuine happiness or intrinsic motivation. The third category was 'genuine

happiness or intrinsic motivation.' Unlike those who stayed in their job roles because

they felt stuck, there were people who remained at SSM Health because they were

genuinely content with their wealth of knowledge and what they were doing. Some of

the responses included:

"I do love my job." (Participant #4).

"[I love] what I'm doing." (Participant #4).

"I am so proud to work for SSM Health." (Participant #5).

"I enjoy what I do for the most part" (Participant #5).

"It has changed over the years, but it is still an important and necessary position to

have" (Participant 5).

"As offices and jobs go, this is a good one." (Participant #5).

"[I love] the reward of helping our patients . . . every case is different and it is like

being a detective solving a case" (Participant #10)

"I feel like I am making a difference with my patients I serve and in my work

environment but always looking for better ways of doing something"

(Participant #10).

"I love my job" (Participant #10)

"All around, I like the work I do" (Participant #13).

"[I have] a good job" (Participant # 14).

"I like what I do and am very good at it" (Participant #16).

"I love this organization!" (Participant #20)

"I am also allowed to make decisions about how to organize and manage my

team" (Participant #25)

"I have a good understanding of what is expected of me" (Participant #30).

"I thoroughly enjoy my job" (Participant #36).

"I have enjoyed my various duties and I have always felt valued . . . I consider

myself a 'lifetime' employee . . ." (Participant #42).

"I enjoy the job and responsibilities" (Participant #43).

"I like what I do" (Participant # 45).

"My role is very self-satisfying" (Participant #50).

"I have a lot of knowledge for the department I'm in" (Participant #57).

"[This is a] stress free job. There is great job satisfaction when you see metrics

move in the right direction" (Participant #90).

As there were only a few responses from employees who felt like they were stuck, there

was an overwhelming response regarding genuine happiness and intrinsic motivation.

Adult learners needed intrinsic motivation in order to grow (Knowles, 1989). The same

was accurate when it came to employees in a growing organization.

    Salary, benefits, and schedule. The fourth category was 'salary, benefits, and

schedule.' SSM Health had a vast array of benefits, and compensation was analyzed

frequently to be as fair as possible to staff members. While there were a few comments

related specifically to the category of 'salary, benefits and schedule,' there was a definite

interest in the employees' salary, benefits and schedule. Some of those comments were:

"I have a retirement plan" (Participant #3).

"I believe the compensations and benefits are fair" (Participant #5).

"Great benefits" (Participant #12).

"[The] set schedule is good. SSM Health is a great company with great benefits"

(Participant #12).

"Great benefits" (Participant #13).

"[I stay for the] pay" (Participant #14).

"[SSM has] good benefits and pay" (Participant # 14).

"It has allowed me to build a great home life because of the benefits and pay"

(Participant #34).

"The benefits were invaluable." (Participant #34).

"The organization provides a stable income with job security" (Participant #35).

"[I stay for] the benefits, the job itself and the pay is great!" (Participant #43).

"Truthfully, the money is very good. I probably would not make the salary I am

currently earning anywhere else . . . especially in a small town"

(Participant #52).

"I enjoy the pay" (Participant #53).

"The pay is very fair" (Participant #60).

"This job worked with my life in terms of hours and outside commitments"

(Participant #89)

"[SSM has] good pay" (Participant #101).

Individuals who commented about their salary, benefits or schedule were generally

positive. The individuals who referenced salary, benefits or schedule inferred that they

were generally content with what SSM Health offered its employees.

Mission, values, and legacy. The fifth category is 'mission, values and legacy.' It

was expected that some employees were drawn to the mission, values, and legacy. That

was no surprise to me. SSM Health prided itself on its mission, values, and legacy. After

the categorical coding was completed, there were vast amounts of commentary that

directly related to the mission, values, and legacy of SSM. Some of the responses

included:

"I love that the sisters chose to set up house here and take care of the sick and

poor . . . and that I am a teeny part of that legacy." (Participant #5).

"When you are fortunate enough to be a part of SSM, you definitely feel like

family with an incredible list of ancestors!" (Participant #5).

"Our heritage is so important to me" (Participant #5).

"It's important to know how we began, see where we are now and where we are

heading" (Participant 5).

"The Mission and values of our organization [are why I stay]" (Participant #10).

"SSM is a great company to work for . . . many opportunities are provided to

explore other areas of the company" (Participant #14).

"I believe in the Mission and Values of SSM" (Participant #25).

"[I] feel like I am part of a great organization that cares about the spiritual and

physical needs of the people that it serves" (Participant #25).

"I love SSM" (Participant #34).

"[This organization provides] benefits along with how much they value their

employees" (Participant #35)

"I believe in our Mission and I know my work is valued" (Participant #42).

"SSM is a good organization with good values" (Participant #46).

"I enjoy what SSM stands for" (Participant #53).

"I believe in the company" (Participant #64).

"In the past, SSM Health's Quality Principles were valued and honored"

(Participant #98).

All of these comments reflect a common theme that revolved around the mission, values,

and legacy of then organization. All of the comments about SSM's legacy were positive

and unique to the culture of SSM Heath.

Opportunities for growth. The sixth category, 'opportunities for growth' was a category offering some impactful reasons as to why people stayed, specifically with this organization. From day one, newly hired employees were taught that SSM Health encouraged initiative and learning. There were many people who implied that they remained with this organization because of the opportunities for growth they found. Some of the responses included:

"[Where we're headed is] very exciting stuff!" (Participant #5).

"My position is one that only comes along once in a lifetime" (Participant #14).

"I wanted to move up the latter because there are a lot of different job

opportunities and over the years they have just increased" (Participant 24).

"I have been able to grow in the roles I have worked in" (Participant #30).

"I have also stayed hoping and praying I will be considered for a management

position one day in the future" (Participant #52).

"There have been ample opportunities for growth" (Participant #58).

"[I] would like to further my career with SSM" (Participant #64).

"[I] continue to learn new things which will help in the future" (Participant #84).

"I've had the opportunity to advance my career and move upward within the

department" (Participant #93).

I am proud to be a part of such a strong legacy. From day one, I felt an attachment to the mission and legacy of SSM Health. It was not surprising that others had the same attachment. Overall, it was concluded that those long-term employees believed in the mission, values, and legacy of SSM Health.

Feeling of being stuck. The seventh category was the opposite of feeling comfortable; it was feeling 'stuck' in a job role. Those who specified that they felt trapped or stuck in their job role mentioned they felt 'stuck' due to lack of experience or having signed an employment agreement of sorts. Some of the responses included:

"I've been here so long; it would be hard to start over somewhere else"

(Participant #16).

"If I leave SSM, I will have to pay back the money owed for my participation in

the MBA program" (Participant #17)

"I cannot get out of this job because I have zero experience in other roles"

(Participant #17).

"[There are] no other jobs available and [I haven't been] hired elsewhere yet"

(Participant #19).

"I have tried and applied for other positions" (Participant #66).

"I believe my manager has destroyed my good name." (Participant #66)

"[I] have looked in other departments, but cannot transfer. . . always seems to be

blocked" (Participant #86).

"HR does not call or email people back when applying . . . no one ever calls you

for an interview" (Participant #86).

While there were only a handful that felt like they were 'stuck' in their job roles, those individuals who were stuck definitely were not happy. All of those responses were unfortunate, because the reader understood that they stayed in a job role in which they were miserable.

Comfort in one's job or environment. The eighth category I determined was 'comfort in one's job or environment.' There were a variety of responses that inferred that the employees were content because they were comfortable with their job roles. Some of those responses included:

"I am comfortable." (Participant #3).

"I am 10 years away from retirement." (Participant #3).

"[I stay here because] I am loyal." (Participant #17).

"I am comfortable here." (Participant #30).

"I've been doing it for so long . . . it's comfortable for me." (Participant #57).

"I have a lot of knowledge for the department I'm in." (Participant #57).

All of those responses led to the conclusion that a number of the long-term employees felt safe in their own surroundings. When individuals felt familiar and comfortable with the environment, they were comfortable in what they were doing. People stayed rather than venturing out and taking the risk to try new opportunities.

Prior to the start of the study, I had predicted which topics could have been given as rationale for staying within an organization. I assumed that the relationship that employees had with their direct supervisor would be the response that was most commonly given, followed by the mission, values, and legacy since SSM Health was a mission-driven organization. I also assumed more responses pertaining to the salary, benefits and schedule were going to be given by the participants, because the salary scale was consistently updated, the benefits were plentiful, and the schedule was flexible. What I was not aware of was that, out of all of the categories, most of the responses gathered reflected that it was the peers of the employees that had the biggest impact on

why people stayed within this organization. This was completely a surprise to me. More than anything else, people stayed in their job roles because of the relationships they had built over time with their peers. Socializing proved to be an important factor in why employees chose to remain with their organizations.

Research Question 2

Research Question 2 specifically focused on potentially identifying common themes related to the perceived level of job satisfaction of the employees who had been with the organization more than five years. Prior to the start of this research study, I did not know what additional themes to expect or to look for. I went into this study vaguely aware of why people had left other organizations, but did not know specifically why people left SSM Health or why they chose to remain with SSM Health.

When developing the survey-questionnaire, I wanted to gather as much data as possible that related to the relationships employees had with their direct supervisors, and within their organization. In order to determine if there were common themes related to the perceived level of job satisfaction of the long-term employees within this study, I needed to determine 'to what extent did each employee perceive that his or her relationship with the direct supervisor impacted how much each liked the job?' In order to gain some perspective on this question, I used the PPMCC to determine if there were any relationships between the responses provided to the statement 'Most days, I like my job' and several of the other questions in Part III of the survey-questionnaire. The PPMCC was run between the statement 'Most days I like my job' and the following statements:

'I am appreciated in my job role'

'My supervisor recognizes me as an individual'

'My supervisor makes me feel that my job is important'

'My supervisor cares about me as a person'

'My supervisor makes an effort to identify my strengths and weaknesses'

'The reporting structure is very clear between my supervisor and myself'

'My supervisor offers objective feedback'

'My supervisor encourages high performance'

In order to be consistent with the rest of the Likert-scale values provided, and Henschke's

(2016) MIPI-EDS, each response was assigned a Likert-Scale value of 1 to 5. The

Likert-scale values to the responses in each question are as such: (1) Completely

Disagree, (2) Usually Disagree, (3) Sometimes Agree or Sometimes Disagree, (4) Mostly

Agree, and (5) Completely Agree.

Amongst the statements compared to 'Most days, I like my job,' there were some

strong correlations. The top five correlations were:

The analysis revealed that the participants' responses to the statement 'My direct

supervisor recognizes me an individual' and the question 'Most days I like my job' were

significantly correlated, $r(47) = .423$, p=.0025 (r-critical = .273; α = .05); null hypothesis

was rejected.

The analysis revealed that the participants' responses to the statement 'The

reporting structure is very clear between my direct supervisor and myself' and the

question "Most days I like my job" were significantly correlated, $r(47)=0.407$, p=.0037

(r-critical = .273; α = .05); null hypothesis was rejected.

The analysis revealed that the participants' responses to the statement 'I am appreciated in my job role' and the question 'Most days I like my job' were significantly correlated, $r(47) = .386$, p=.0062 (*r*-critical = .273; α = .05); null hypothesis was rejected.

The analysis revealed that the participants' responses to the statement 'My direct supervisor encourages high performance' and the question 'Most days I like my job' were significantly correlated, $r(47)=0.335$, p=.0186 (*r*-critical = .273; α = .05); null hypothesis was rejected.

The analysis revealed that the participants' responses to the statement 'My direct supervisor makes me feel that my job is important' and the question 'Most days I like my job' were significantly correlated, $r(47)=0.351$, p=.0134 (*r*-critical = .273; α = .05); null hypothesis was rejected.

Overall, there were a number of additional correlated relationships that pertained to the employee and his or her direct supervisor. The remainder of the strong correlations were:

The analysis revealed that the participant's responses to the statement 'My direct supervisor makes an effort to identify my strengths and weaknesses' and the question 'Most days I like my job' were correlated, $r(47)=0.297$, p=0.0382 (*r*-critical = .273; α = .05); null hypothesis was rejected.

The analysis revealed that the participant's responses to the statement 'My direct supervisor offers objective feedback' and the question 'Most days I like my job' were correlated, $r(47)=0.291$, p=.0425 (*r*-critical = .273; α = .05); null hypothesis was rejected.

The analysis revealed that the participant's responses to the statement 'My direct supervisor cares about me as a person' and the question 'Most days I like my job' were slightly, $r(47)=0.273$, p=.0577 (*r*-critical = .273; α = .05); null hypothesis was rejected.

It was through this process that I determined that while people stayed in their job roles because of the relationships they built within the workplace setting, the employees' supervisors played a major role in whether each person actually liked his or her job. Through analyzing these specific statements, I compared the statement 'Most days I like my job,' which led me to two specific overall conclusions: (a) The role of the supervisor impacted whether the employees liked their jobs, and, (b) there were five main themes that managers needed to focus on in order for employees to like their actual jobs. Those themes were: (1) Managerial appreciation and recognition of employees, (2) Supervisor's providing of emotional and mental support, (3) Employee individualization, (4) Clear two-way communication between the supervisor and the employee, and (5) Expectation of high performance.

These results are important because they showed that regardless of how far the use of technology had come in the global market, the relationships that were built within the workplace environment still had a major effect on how the employees felt about their actual job roles. These results also indicated that regardless of how processes in organizations would continue to shift globally, the employees were first, and foremost, social beings who desired to be recognized, appreciated, supported, communicated clearly with, and built up for success.

Research Question 3

Whereas RQ1 and RQ2 focused on then-current employees, RQ3 focused specifically on trends that could be identified from experiences from past employees. Because of lack of access to data earlier approved for this study, I was unable to answer RQ3; however, alternate data was provided by SSM and results are discussed here.

In order to look for themes related to the experiences of past employees, I specifically requested all exit interviews from the PBS division during the five years previous to this study. After executing all possible avenues to obtain those exit interviews, I was ultimately refused access to the exit interviews. However, SSM Health did provide me with secondary data that was intended as a very high level explanation of turnover trends with the PBS division of SSM Health. With the usage of the Human Resource-Exit Partnership Reports from the years 2013 to 2016, I was able to draw some vague conclusions. These reports provided a brief explanation as to why individuals had left SSM Health in the past. In 2013, the PBS division of SSM Health underwent a significant number of changes. There was a great deal of restructuring within this division during that time. While the Human Resource-Exit Partnership Reports provided some insight, I wanted to be clear that it did not apply strictly to the 17 departments chosen to participate in the three-part research study. It applied to the whole PBS division of SSM Health.

In 2013, the two most common responses to the question 'What made you decide to look [for a new job]?' on the Human Resources-Exit Partnership Report were: (a) direct management and (b) normal retirement. In 2014, the two most common responses to the question 'What made you decide to look [for a new job]?' on the Human

Resources-Exit Partnership Report were slightly different than the previous year. The

two most common answers in 2014 were: (a) lack of employee job satisfaction and (b)

direct management. Over the course of 2015, the most common themes shifted once

more. In 2015, the two most common themes were (a) normal retirement, and (b) direct

management. In 2016, the two most common themes were different as the previous years

as well. The two most common themes were (a) direct management, and (b) the job

itself. While all of these reports were slightly different, all of these responses aligned

with each other.

　　　　In conclusion, as the population and the PBS division shifted, some of the themes

varied. The only theme that did not vary year-to-year was the theme of 'direct

management.' Much like those that chose to remain because of their supervisors, there

were a number of people that also chose to leave because of their direct supervisors.

Table 11

'What made you decide to look for a new job?'

Year	Response 1	Response 2
2013	Direct Management	Normal Retirement
2014	Lack of Employee Job Satisfaction	Direct Management
2015	Normal Retirement	Direct Management
2015	Direct Management	The Job Itself

Note. These were the two most two most common responses to 'What made you
　　　decide to look for a new job' as noted on the SSM Health's Human Resources
　　　Exit Partnership Report.

Summary

　　　　After having experienced the research process, learning the results of the study

was the most exciting part of this research project thus far. I went into this study naïve,

and blind to any biases. One of the greatest aspects about this research was that some of

it was genuinely surprising to me. First of all, I thought that there would be a relationship

between how long people stayed within their organizations and how satisfied they were

in their jobs. As the results indicated, that was not the case. There was no correlation

between an employees' length of service and their perceived level of job satisfaction.

Secondly, I hoped that there would be a relationship between what the employees

identified on the MIPI-EDS and the perceived level of job satisfaction. My research

study concluded that, in fact, there was a strong correlation between a majority of the

factors, the factor focusing on trust were rated the highest. Thirdly, judging from the

responses provided on the survey-questionnaire, the relationship between employees and

their supervisors was not the only one that mattered with regard to job satisfaction. The

relationship that employees had with their peers was also valuable to understand, as it

impacted why employees chose to remain with the organization. Fourthly, there were a

few additional themes determined by this study. The most important of the themes was

that when employees established positive, supportive relationships with their supervisors

and peers, they were more likely to stay in their job roles as well as be happy with their

actual jobs. Relationships were a huge part of job satisfaction. While benefits and the

mission statement played a role in job satisfaction, it was the relationships that had the

largest impact on job retention.

Chapter Five: Discussion and Reflection

In its beginning stages, this study focused primarily on why people left organizations, specifically, why employees of SSM Health left. By the end of the process, the study transformed into something different. I had a strong interest in the reasoning and rationale as to why employees left organizations. With some strong consideration and thought, the original concept for this dissertation transpired into a project focused on why employees chose to say with their organizations. I decided to focus on the question 'Was there any impact between the perceived relationships of the employees and their direct supervisor and whether or not an employee chose to remain with the organization?' Looking through my quantitative and qualitative data, I would have to say, ultimately, yes. There is an impact between the perceived relationships of the employees and their direct supervisors. The relationships that people built while in the workplace setting did have an impact on whether an individual chose to remain with the organization.

In Chapter Two, I bridged andragogy to the fields related to the corporate world. The businesses that thrived in the global market at the time of this writing were definitely andragogical. Andragogy was directly connected to organizational development and organizational learning (Brookfield, 1983, 1984, 1987; Knowles, 1968a; Knowles, 1968b; Knowles, 1989a; Harrington, 2000; Mezirow, 1981; Vatcharasirisook, 2011). Organizational trust had a direct connection to employee retention, turnover, and employee job satisfaction (Janetta, 2013; Twomey, 2002; Yang et al., 2007). While all of these factors discussed in Chapter Two were very different and were intended to be used differently, they all connected to each other. Much as adult learners needed to be actively

involved in their education, employees in organizations needed to be involved in the

planning and execution of their own training, development, and learning (Ramnarayan &

Gupta, 2011). Knowles (1968b,1984) acknowledged that adult learners had previous

experiences. Organizations recognized and encouraged previous experiences as well.

That was why it was rare to find a job application that did not prefer some sort of

previous experience. Individuals brought their prior experiences with them into the

workplace. That was also why organizations valued their long-term employees. Long-

term employees brought experience and knowledge that was costly to replace. Knowles

(1984) also noted that adult learners valued relevancy. Engaged employees of

organizations also valued relevancy (Knowles, 1968b; Knowles, 1986a; Ramnarayan &

Gupta, 2011). A contemporary example of this was seen in employees who were

encouraged to attend workshops or conferences. The best way for employees to say

'thank you' to one's superior for allowing the opportunity to learn in the workplace was

to be able to bring knowledge back to their teams, and to use it in their daily work

environment. Adults did not want to learn about a topic that was not immediately useful.

Adult learners were problem-centered (Knowles, 1984). The same was true of engaged

employees within organizations. Employees wanted to know how to solve the issues they

had in their then-current roles. They had no desire to learn or work on content-driven

material if it was not relevant to the problems they faced. Andragogy changed the way

that adult learners viewed the classroom setting. Classrooms with adult learners shifted

from teacher-centered to student-centered. As adults have taken a more active role in

their own learning, andragogy has changed the face of corporations, how others perceived

spirituality, and how others even approached societal change in Africa.

Both OD and organizational learning were connected to andragogy as well. All three fields played an intense role in the survival and sustainability of corporations. Organizations needed to be creative in order to continue to develop (Bartunek et al., 2008; Yang et al., 2007). Several authors agreed that when the organizations' leadership functioned andragogically, the employees and organizations performed better (Janetta, 2013; Twomey, 2002; Vatcharisiook, 2011; Yang et al., 2007). The relationships built within organizations directly impacted the overall health of the organization (Twomey, 2002). The field of OD focused directly on how organizations changed and improved (Ramnarayan & Gupta, 2011). Organizations that were not learning were not changing, and therefore, became stagnant. In order to allow the organization as a whole to learn, the organization encouraged individual learning. Organizational learning created innovation and engaged successful employees. Employees wanted to be engaged with their organizations. They wanted to learn from, and within, their organizations. While the definition of organizational learning was subjective to each individual author or organization, it was still necessary in order for organizations to compete in their own markets (Bontis et al., 2002; Fiol & Lyles, 1985; Garvin, 1994; Harrington, 2000; Kim, D., 1993; Shrivastava, 1983; Simon, 1969; Vatcharisiook, 2011). When organizations did not change with the times, they lost their customer base, and their business died. This was not something unusual to see, especially in the evolving markets at the time of this writing. Failure to change or adapt to the audience and market led to bankruptcy and company failure. Three examples of companies that closed because they failed to adapt to the changing market were Circuit City, Blockbuster Video, and Borders.

Circuit City was a company known for selling appliances, both large and small. "The Richmond, Virginia based firm, with revenues of more than $12 billion, had been one of the pioneers in the 1970s and 1980s in mass marketing televisions, refrigerators, stereos and boom boxes" (Galuszka, 2008, Para. 2). Circuit City announced its bankruptcy in 2008. In the 1970s and 1980s, "Circuit City built itself into 1520 stores in the U.S and Canada and 46,000 workers" (Galuszka, 2008, Para 4). In the article, *Eight Reasons Why Circuit City Went Bankrupt,* Galuszka (2008) referred to a list reasons that led to the bankruptcy of Circuit City. Some of those reasons included: (a) Failure to sell upcoming, popular appliances or electronics, (b) Letting talented leaders go due to fiscal reasons, (c) Stores became too impersonal, and (d) As companies like Best Buy and Costco started building a large customer base, Circuit city became merely reactive and lacked innovation.

Circuit City represented a prime example how companies had the opportunity to shift towards andragogical methods of leading staff and failed to do so. By responding reactively to a changing market, Circuit City lost its clientele and allowed other companies to build a customer base that should have fallen directly into their scope of business.

Blockbuster Video was another company that once was profitable that plummeted due to failure to change to its existing market. Satell (2014) recalled:

In 2000, Reed Hastings, the founder of a fledgling company called Netflix, flew to Dallas to propose a partnership to Blockbuster CEP John Antioco and his team. The idea was that Netflix would run Blockbuster's brand online and Antioco's firm would promote Netflix in its stores. Hastings got laughed out of the room.

We all know what happened next. Blockbuster went bankrupt in 2010 and Netflix

is now a $28-billion-dollar company, about ten times what Blockbuster was

worth. Today, Hastings is widely hailed as a genius and Antioco is considered a

fool. Yet, that is far too facile an explanation. (Satell, 2014, Para. 1 and 2)

Despite this monumental mistake, Antioco was viewed as a competent executive, because

he had a long history of success. Yet, for all of his operational success, he failed to see

an evolving market and audience. This monumental decline could have been avoided.

"When Hastings flew to Dallas and proposed his deal in 2000, Blockbuster sat atop the

video rental industry. With thousands of retail locations, millions of customers, massive

marketing budgets and efficient operations, it dominated the competition" (Satell, 2014,

Para 4). Antioco failed to see the opportunity in Netflix. He perceived Netflix as a

disruptive distraction. In order for Blockbuster and Netflix to merge forces, Blockbuster

would have to tremendously alter its business model and risk damage to its profitability

in order to merge with Netflix. Although Netflix was much smaller, and still in its

building stages, it was recognized by its customers as positive and was steadily growing

in popularity. Antioco failed to recognize that the customers that once were Blockbuster

Video customers were switching to Netflix because of the convenience factor.

Andragogically, if Antioco had the foresight to see the relevance of Netflix, and offered it

to Blockbuster Video's customers, Blockbuster Video might have remained successful.

What Antioco did not anticipate was that the future would lead to individuals across the

globe desiring to turn on Netflix with the click of a button rather than to drive to a facility

to pick up a video to be returned later.

The last example of a company that closed its doors because it failed to change to meet the needs of its audience was Borders, a book store chain. Borders closed its doors in 2011 after having been in business for 40 years. When Borders opened its doors, the industry was completely different than when it closed (Sanburn, 2011). Because it was late too change its policies to fit the technology shifts and comparable markets, it eventually filed bankruptcy and closed its doors to the public (Sanburn, 2011). Because those organizations failed to accept a changing industry and learn from the successes of their competitors, they closed after having been open for several years.
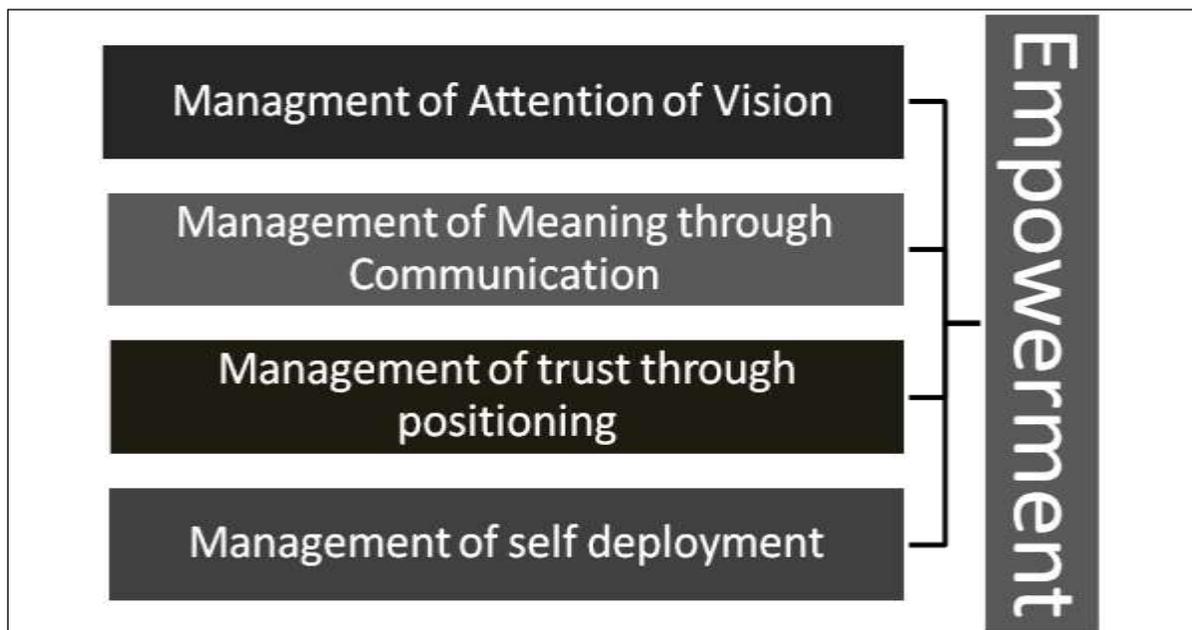
Figure 12. Bennis' four competencies of leadership.

In retrospect, all three of those organizations might have continued to thrive if they had considered Bennis' (1984) four competencies of leadership. Those four competencies were: (I) Management of attention (through vision), (II) Management of meaning (through communication), (III) Management of trust (through positioning), and

(IV) Management of self (deployment) (pp. 17-19). Bennis (1984) found that when leaders exhibited all of these competencies, the end result was employee empowerment.

In the early 1980s, Bennis (1984) spent time with 90 of the most effective, successful leaders in the United States. Of those leaders, 60 came from corporations, and 30 were from the public sector. The goal of his studies was to find common traits amongst the group. Despite the diversity of the group of successful leaders, Bennis (1984) identified specific areas of competence shared by all 90 leaders. The study was conducted during a 'down productivity and economic time in the USA;' but each leader did not just help his organization survive, each helped his organization retain excellent personnel and flourish economically (Bennis, 1984).

In order to meet the needs of changing industry, corporations needed to be able and willing to learn in order to plan for future needs. Bennis (1984) noted:

> If I have learned anything from my research, it is this: The factor that empowers the work force and ultimately determines which organizations succeed or fail is the leadership of those organizations. When strategies, processes or cultures change, the key to improvement remains leadership. (p. 16)

Without learning, leaders were unaware that the market changed and the impact was often a day late and a dollar short.

Employee job satisfaction and organizational trust were also connected to andragogy, OD, and organizational learning as well. James and James (1989) related a number of employee job satisfaction factors that connected directly to andragogy. They noted that the organizational climate included four main overlying factors: (1) The role of stress and harmony throughout the organization, (2) Job Challenge and autonomy, (3)

How the leader facilitates and supports employees, and (4) Work-group cooperation, friendliness and warmth (James & James, 1989, p. 740).

Much of employee satisfaction revolved around the relationships developed within the workplace environment. This was directly connected to Knowles' (1984) assumptions of adult learners. In organizations, employees functioned as adult learners. Knowles' six assumptions of adult learners played a role as to whether employees felt satisfied within their organizations. Those six assumptions were: (1) Self-concept, (2) Adult learner experience, (3) Orientation to learning, (4) Readiness to learn, (5) Motivation to learn, and (6) Adults need to know why.

How satisfied employees were in their organizations directly reflected how much trust existed between and/or among the supervisor and the employee. The two elements went hand-in-hand (Atkins, 2016; Starnes et al., 2010). Without job satisfaction, employees did not trust their leaders. And without leadership trust in employees, employees lacked employee job satisfaction.

Andragogical leadership methods, OD and organizational learning, employee job satisfaction, and organizational trust directly related to the levels of turnover or retention that SSM Health had over the period of five years. History of an organization and a set of roots were established when an organization had a high retention rate of employees. It was difficult for organizations to keep moving forward without these elements. It was also costly to organizations if they did not establish a balance of these elements. Employees, especially the long-term, competent employees were arguably the most valuable resource available to an organization.

Limitations

This research study was not without limitations. Most of the quantitative portion of this study focused on the exploration of the perceptions of the feelings, beliefs, and behaviors that supervisors exhibited towards their employees. These perceptions were measured by the MIPI-EDS. The research study did not examine a variety of other factors that may contribute to turnover or retention in organizations, such as the organization's policies, system locations, or the perceived employee workloads, that influenced the employees' job satisfaction, and the employees' desire to leave or remain with the organization over a period of time.

An additional limitation revealed during the initial stages of approval was that the study would not include all of the departments within the PBS division of SSM Health. When meeting with the vice president of the PBS division to preliminarily discuss the research project, it was his recommendation that the study only be distributed to departments similar in structure and design, limiting the exploration to 17 departments.

Another limitation discovered was the employment of temporary employees. Originally, I intended that temporary employees who were placed in any of the 17 participating departments would be allowed to participate. Immediately prior to the initial push of the three-part research study, it was made clear to me that there was no method to send those temporary employees the survey-questionnaires electronically. While the organization kept track of the email addresses of the permanent employees, the organization did not allow the temporary employees to have company email addresses. As a result of the organization not allowing the temporary employees to have company

email addresses, the three-part research study was only distributed to permanent

employees in specific departments within the PBS division of SSM Health.

Unbeknownst to me at the start of the study, two barriers were found while using

Google as the source to distribute all communication, including the survey-

questionnaires. Both of the barriers revolved around a restriction set by Google that

limited the number of emails and Google Doc survey-questionnaires that could be sent in

one 24-hour period. Once the issue was exposed, I made accommodations to fit the

needs of my study, as well as to abide by the restrictions imposed by Google. Initially,

the informational recruitment emails were intended to be sent to all employees at the

same time. Due to Google restrictions, the addresses were divided into two groups: last

names beginning with A through M and last names beginning with N through Z. Any

recruitment or reminder emails sent from then on were split into two groups to prevent

any obstacles that could potentially occur and to maintain consistency throughout the

study. The restriction that Google set on how many Google Docs could be sent was

limited to 100 in a 24-hour period. Because of this restriction Google imposed, the

survey-questionnaires studies were sent over the course of five consecutive days to the

participants. As there were 448 participants asked to participate in the research study, my

research assistant sent out the surveys over the course of the five days. In order for all

possible participants in the study to have the full 30 days to participate in the study, the

length of the study was extended by five days.

The last limitation that was determined during the course of the study focused on

Research Question 3. RQ3 focused on trends and commonalities identified from the

experiences of past employees. The initial request to determine this point was to examine

exit interviews collected during the course of the five years previous to this writing. The

outcome for this question was inconclusive due to a miscommunication that occurred

between myself and the organization's institutional review board (IRB). After

performing all due diligence to attempt to retrieve this information, I was denied access

to the information. The only secondary data relating to past employees made available to

me was intended to supply an explanation of employee turnover trends and consisted of

Exit Partnership reports from the years 2013 to 2016. These reports applied to the entire

PBS division, not just the 17 that participated in the study.

In summary, there were several limitations pertaining to this study. Some of the

barriers were anticipated, while others were not. As the limitations were present, I

collected a significant amount of valid data that could be used to explore the relationships

that employees perceived with regard to their direct reports.

Summary of Study

During Chapter Three, I laid out the entire process of how and why this study

came to be. Following my initial plan as closely as possible, I was able to complete the

study effectively and efficiently. The intention of the study was to determine whether (a)

There was a relationship between the factors of the direct report on the MIPI-EDS

identified by the employees and each employee's length of service with the organization;

and (b) There was a relationship between the factors identified on the MIPI-EDS and the

employees' level of job satisfaction. The study also aimed to determine (a) Why the

employees of the PBS division of SSM Health who had been with the organization longer

than five years chose to remain with the organization and (b) If there were any common

themes related to the perceived level of job satisfaction of the long-term employees.

Prior to receiving IRB and all other formal approvals, I ensured that this process was as well thought out and clear as possible. Because the procedures established previously were very proactive, it was relatively easy to be reactive to the unexpected hurdles that came along the way. Every modification made to the original procedural plan was due to a barrier that occurred throughout this process. Even with all of the barriers and complications, the study was not compromised and as soon as the hurdle was surpassed, I kept the study on the same intended track.

Initially, I was anxious and nervous that the number of people intended would not participate the study. It was assumed that the feelings were common among doctoral candidates. Those feelings of fear and anxiety were soon put to rest when the minimum number of 25 participants for Parts I and II and the minimum number of 15 participants were surpassed during the first week of the study. There was a short lull after the first week passed and that was when my research assistant sent the first reminder email to the employees on behalf of myself. After the initial reminder was sent out, there was another jolt of participants that participated in the process. At the end of the timeframe allotted for the study, there were 102 people who opted to participate. Out of those 102 people, 52 were long-term employees. After all of the survey-questionnaires were scored according to the guidelines, there were two deemed invalid due to lack of completion and pulled from the rest of the data. Those two survey-questionnaires were completed by two long-term employees. At the end of the scoring process, there were 100 valid and completed survey-questionnaires. Of the 100 valid and completed survey-questionnaires, 49 were contributed by long-term employees.

Hypotheses and Research Questions

I analyzed two hypotheses and two research questions:

H_1: There is a relationship between the supervisor's factors identified by the data collected on the employee's MIPI-EDS and the employee's length of service to the organization.

H_2: There is a relationship between the supervisor's factors identified by the data collected on the employee's MIPI-EDS and the level of job satisfaction that an employee feels within his or her job role.

RQ1: Why have employees within the Patient Business Services (PBS) division of SSM Health who have been employed within this organization for more than five years chosen to remain within the PBS division of SSM Health?

RQ2: What, if any, common themes are related to the perceived level of job satisfaction of the employees who have been with the organization more than five years?

RQ3: What, if any, trends could be identified from the experiences of past employees? As discussed earlier in Chapter Three, data for RQ3 was unexpectedly unavailable for analysis. Details were provided in Chapter Four discussion and again earlier in Chapter Five.

After all of the scoring and calculations were completed, I found that the data did not match my assumption for the first hypothesis question. Ultimately, I failed to support Hypothesis 1 and no relationship was established. Unlike, the results for the first hypothesis, I found a direct correlation between the amount of trust that the employee perceived his or her direct report to have and the employee's level of job satisfaction. For Hypothesis 2, I supported the hypothesis and a relationship was established.

During the research question analysis portion of Chapter Four, I confirmed a variety of reasons and rationale as to why individuals chose to leave their organizations, which aligned with the literature identified by various authors in Chapter Two (Gberevie, 2008; James & Mathew, 2012; O&P Business News, 2008; Wang et al., 2014). The first research question focused on why long-term employees chose to remain at SSM Health. There were a few assumptions I had prior to starting the process. I assumed that people chose to remain with the organization primarily because of the salary and benefits offered by the organization, or because of the mission and values of the organization. While those were factors that encouraged employees to remain with the organization, those were not the most prominent or only factors. I was wrong in my assumption that salary and benefits or the values and mission were the main reasons people chose to remain with an organization. According to the responses provided, the most common reason that individuals chose to stay within SSM Health revolved around the positive interactions individuals had with their co-workers and peers, closely followed by their relationships with their supervisors. After the study was concluded, I came to the realization that there were a number of reasons that people leave their organizations, but overall, it was the relationships established in the workplace that allowed employees to remain with their organizations.

Research Question 2 focused on additional themes found in the data of the long-term employees. While there were a number of themes that could be considered recommendations, there was one theme that was found abundantly in the results. How much an individual liked or disliked the job had a direct connection to the positive or negative relationship that employees had with their direct reports or managers.

Recommendations for Future Research

It was the unexpected results found in the data that provided the opportunity for

further questions to be asked. One of the questions posed by the data interpretation was,

'How much does the manager impact whether or not a person likes their job?' In Chapter

Four, I analyzed responses to a number of questions that could answer that question. It

was found in the data that the relationship employees had with their managers determined

whether an individual actually enjoyed his or her job.

There were additional questions prompted by the finalized data collection, which

may require further investigation. Some of the additional questions focused on specific

variables that could be added or eliminated. Some of these variables included using all of

the PBS departments, or using just one specific department. Another variable would be

the size of the department. Other questions focused on measuring each entity of SSM

Health to determine if the study was replicated on an individual level to discover if the

results would align with results that I received during the study. Another question would

be, 'To what extent does the peer relationship determine whether or not an employee

likes their job?' Another question would be, 'What impact, if any, does the relationship

that individuals have with their peers impact overall job satisfaction?' However, the

statute of limitations was met by the research study, and no further investigations into

these questions were obtained at the conclusion of the study. These were all discussions

that I am interested in investigating in the future. Lastly, I recommend additional studies

focusing on the impact of emotional intelligence and managerial styles. 'Does the level

of emotional intelligence that those in a managerial or leadership role impact how they

choose to lead?' and 'Does the level of emotional intelligence have any impact on overall

employee job satisfaction?' were two of the questions that I considered immediately for

future research. This led to the conclusion that regardless of how organizations shift and

change futuristically, we still will be social beings at the core of every possible process.

The data that I found determined the importance of the relationships in the workplace

environment. It is my recommendation for future research that all of these discussions be

considered for future research studies. As the fields of andragogy and OD continue to

help businesses to develop learning cultures, these studies may be increasingly valuable

to maintain employee retention and decrease employee turnover.

Conclusion

In conclusion, the development and execution of this research study was a very

fulfilling experience. As a young professional in a growing field, I followed my passions

for andragogy and OD in order to search for answers to deep-rooted questions of various

organizations. As anticipated, there were a number of hurdles that I needed to surpass in

order to continue throughout the research study, such as the restrictions imposed by

Google on sending out Google Docs and emails. Ultimately being denied the exit

interviews of the past employees from the PBS division was also a hurdle that I did not

expect. Although, both hurdles caused a great deal of anxiety while they were occurring,

after everything was finished, I learned tremendously from both of them. I learned that

even as nobody will ever be completely prepared. I also learned that some of the

unexpected hurdles teach patience and resourcefulness.

While there were definitely a fair number of hurdles, there were also a number of

pleasant unexpected results found through this dissertation process as well. One of the

greatest elements of this study was the impact that it left on me as a professional in the

field of corporate learning. I have been in the field of corporate learning for a majority of my career, and it still was exciting when I was able to verify thoughts I had previously had or when I learned that my assumptions may not be correct as well. It was eye-opening. While this study presented several important findings, there were two findings that were especially important. The first of which was the discovery that the relationships that employees developed with their peers was the most prominent reason that employees chose to stay at SSM Health. The second most important finding was that there was no correlation between the level of job satisfaction and the employees' length of service. Both of these findings were unexpected, so it was especially important to be able to bring those to light.

This experience has offered me invaluable insight into SSM Health, which was my current organization at the time of this writing, but also any other organization I may be affiliated with in the future. The knowledge gained from this study are irreplaceable in the research I may choose to conduct in the future.

I sincerely hope to do further research in the fields of andragogy, OD, or organizational learning. When I started this project, I knew a great deal about how to use andragogy in a corporate classroom setting, and was experimenting with using it outside of a corporate classroom setting as well. I knew small pieces of how OD came to be. It was through extensive research and piecing story after story together that I was able to create some sort of cohesive timeline of how OD came to be. Finding the missing pieces and putting the story together was highly rewarding for me as an adult educator in the corporate world. It was vindicating to read other people's experiences with organizational trust, job satisfaction, and employee retention. There were many patterns

that I have seen throughout my career that I could never truly validate, but after

completing the literature review for this project, I realized that I am definitely not alone

in my assumptions.

Conducting the actual study was both stressful and exciting. Analyzing the data

was just as exciting. I felt like it all was an adventure. After all was finally completed, I

was pleased with my findings. It was those findings that sparked additional questions for

future research. If I could do it all over again, there were definitely things I would

approach differently. First of all, I might have included a focus group as well. It would

have been interesting to hear how the group perspectives differed from the individual

perspectives. While I was not displeased with the restrictions that Google imposed on the

amount of Google Docs or emails that could be sent in one day, that was definitely a

challenge I would reconsider in the future. Although it seems unrealistic to me, I would

have liked to have performed this study throughout the entire SSM Health System. I

think it would be incredibly interesting to compare the results from the PBS division to

the results that would be given throughout the whole system. Another aspect that I would

do differently would be that I would like to incorporate interviews into the qualitative

data as well. In order to avoid the barriers of time and money, I chose to make the

qualitative portion limited to open-ended questions. I would have loved to been able to

interview the individuals who have been with the organization for more than five years to

gain additional perspective into the health of my organization.

Ultimately, I am pleased with the data that I retrieved and the work that went into

this project. It has challenged my viewpoint and forced me to think differently than I

once did. While there were hurdles and things I would do differently, I am so

overwhelmingly grateful to have this experience to begin with. I am so incredibly

fortunate to be able to chase my passions and to have an organization that was so

supportive.

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Appendix A: Research Design

Instructions for Part I:

Part I consists of eight questions that focus specifically on providing your demographic information. Please answer each question completely before progressing to the next question. Please type in the answer to the question asked or click on the button that best describes your specific information.

Part I: (To be completed by everyone who chooses to participate in the research study)

- **Demographics**
    - What is your name, phone number and email address?

    - What is your department? (This question is a drop down question.)
        - Cash Applications
        - CBO Leadership
        - Operations Support
        - Commercial Claims Processing
        - Government Claims Processing
        - Claims Review Specialist
        - Customer Service
        - Commercial Follow-up
        - HBP (Hospital Based Providers)
        - Medicaid Follow-Up
        - Medicare Follow-Up
        - PSC Leadership
        - 3rd Party Collections (SIL Follow-up)
        - 3rd Party Collections (TPL/WC)
        - Pre-registration
        - Pre-Service (Financial Clearance)
        - Self-Pay
    - What is your gender?
        - Male
        - Female
        - I would prefer not to identify as male or female

    - What is your age?
        - Under 21
        - 21-30 years old
        - 31-40 years old
        - 41-50 years old
        - Above 50 years old

    - What is your highest level of education?
        - Some school
        - High school diploma or GED
        - Associates Degree

- Bachelor's Degree
- Master's Degree
- Doctorate Degree

o What is your current work status?
- Permanent full-time employee
- Permanent part-time employee
- Temporary full-time employee
- Temporary part time employee

o How would you describe your current job satisfaction?
1. I am very dissatisfied with my job.
2. I am mostly dissatisfied with my job.
3. I sometimes am satisfied with my job.
4. I'm mostly satisfied with my job.
5. I'm very satisfied with my job.

o How long have you been working at SSM?
1. Less than one year
2. Between 1-5 years
3. Between 5-10 years
4. Between 10-15 years
5. Between 15-20 years
6. More than 20 years

Part II: **(To be completed by everyone who chooses to participate in the research study).Modified Instructional Perspectives Inventory (MIPI-EDS)—Adapted for employees and their Direct Supervisor.**

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Instructions for Part II:

Listed below are 45 statements reflecting beliefs, feelings, and behaviors beginning or seasoned managers or supervisors may or may not possess at any given moment. Please indicate how frequently each statement typically applies to your direct supervisor. Click on the letter that best describes your supervisor.

Almost Never | Not Often | Sometimes | Usually | Almost Always

How frequently does your direct supervisor…

1. Use a variety of teaching techniques?   A   B   C   D   E

2. Use buzz groups (employees placed
in groups to discuss information from
meetings or educational lectures)?   A   B   C   D   E

3. Appear to believe that his or her primary
goal is to provide employees with as much
information as possible?   A   B   C   D   E

4. Appear to be fully prepared to lead?   A   B   C   D   E

5. Have difficulty understanding the employee's
point of view?   A   B   C   D   E

6. Appear to expect and accept employee
frustration as they grapple with problems
or issues?   A   B   C   D   E

7. Purposefully communicate to employees
that each employee is uniquely important

		A	B	C	D	E
	to the organization?	A	B	C	D	E
8.	Express confidence that learners will develop the skills they need?	A	B	C	D	E
9.	Show he or she values searching for or developing new management techniques?	A	B	C	D	E
10.	Teach employees through simulations of real-life settings or situations?	A	B	C	D	E
11.	Appear to communicate exactly what and how he or she has planned?	A	B	C	D	E
12.	Notice and acknowledge positive changes in employees?	A	B	C	D	E
13.	Have difficulty getting his/her point across to his or her staff?	A	B	C	D	E
14.	Appear to believe that employees vary in the way they acquire, process, and apply the content knowledge to their job role?	A	B	C	D	E
15.	Really listen to what his or her staff have to say?	A	B	C	D	E
16.	Appear to trust employees to know what their own goals, dreams and realities are like?	A	B	C	D	E
17.	Encourage his or her employees to solicit assistance from other employees if it is needed?	A	B	C	D	E
18.	Appear to feel impatient with employee's progress?	A	B	C	D	E
19.	Balance his or her efforts between employee content or skill acquisition and motivation?	A	B	C	D	E
20.	Make his or her presentations clear enough to anticipate and address all employees' questions and/or concerns?	A	B	C	D	E
21.	Conduct all group discussions?	A	B	C	D	E
22.	Establish departmental objectives?	A	B	C	D	E
23.	Use a variety of instructional media? (internet, video, sound clips)	A	B	C	D	E

24. Use listening teams (learners grouped
together to listen for a specific purpose)
during lectures?   A   B   C   D   E

25. Appear to believe that his or her leadership
skills are as refined as they can be?   A   B   C   D   E

26. Express appreciation to employees
who actively participate?   A   B   C   D   E

27. Appear to experience frustration
with employee apathy?   A   B   C   D   E

28. Appear to reward the employee's
desire to take initiative?   A   B   C   D   E

29. Appear to feel that employees need to be aware
of and communicate their thoughts and feelings? A   B   C   D   E

30. Enable employees to evaluate their own
progress in learning new skills and ability?   A   B   C   D   E

31. Hear what employees indicate
their departmental needs are?   A   B   C   D   E

32. Have difficulty with the amount of time employees
need to grasp various concepts?   A   B   C   D   E

33. Promote positive self-esteem in employees?   A   B   C   D   E

34. Require employees to follow the precise
interests which the he or she provides to them? A   B   C   D   E

35. Conduct role plays in order to teach
or to instruct new skills or concepts?   A   B   C   D   E

36. Appear to act bored with many
questions that employees ask?   A   B   C   D   E

37. Individualize the pace of
learning for each employee?   A   B   C   D   E

38. Help employees to explore their own skill
sets and abilities?   A   B   C   D   E

39. Engage employees in determining and

clarifying their own aspirations?   A   B   C   D   E

40. Ask the employees how they would
    approach a specific task or skill?
                                                 A   B   C   D   E
41. Appear to feel irritation at the employee
    in attentiveness in the organizational setting?   A   B   C   D   E

42. Integrate leadership techniques
    with content knowledge?   A   B   C   D   E

43. Develop supportive relationships
    with employees?
                                                 A   B   C   D   E
44. Appear to experience unconditional
    positive regard for employees?   A   B   C   D   E

45. Respect the dignity and integrity of the employees?   A   B   C   D   E

** This is the sheet in which the 45 responses from Part II will be will be calculated. This will NOT be completed by the employees who decide to participate in the research study. Those who choose to participate in the research study will not see this factoring sheet or the scoring guide. This will be completed by the researcher after all of the employees who have chosen to participate in the study have finished the survey. It is important to view because this is how the MIPI-EDS will be scored in order to determine the seven factors that are measured by the MIPI.

Instructional Perspectives Inventory Factors

1	2	3	4	5	6	7
4____	7____	1____	6____	5____	2____	3____
12___	8____	9____	14___	13___	10___	11___
19___	16___	22___	15___	18___	21___	20___
26___	28___	23___	17___	27___	24___	25___
33___	29___	42___	37___	32___	35___	34___
	30___		38___	36___		
	31___		40___	41___		
	39___					
	43___					
	44___					
	45___					
Total	**Total**	**Total**	**Total**	**Total**	**Total**	**Total**
☐	☐	☐	☐	☐	☐	☐

** This is the sheet in which the 45 responses from Part II will be will be calculated. This will NOT be completed by the employees who decide to participate in the research study. Those who choose to participate in the research study will not see this factoring sheet or the scoring guide. This will be completed by the researcher after all of the employees who have chosen to participate in the study have finished the survey. It is important to view because this is how the MIPI-EDS will be scored in order to determine the seven factors that are measured by the MIPI.

Scoring Process

A=1, B=2, C=3, D=4, and E=5

Reversed scored items are 3, 5, 11, 13, 18, 20, 25, 27, 32, 34, 36, and 41. These reversed items are scored as follows: A=5, B=4, C=3, D=2, and E=1

Factors	Total	Possible Minimum	Possible Maximum
1. Direct Supervisor's level of empathy with employees	_____	5	25
2. Direct Supervisor's trust of employees.	_____	11	55
3. Planning and delivery of instruction.	_____	5	25
4. Accommodating employee uniqueness	_____	7	35
5. Direct Supervisor *insensitivity* to Employees	_____	7	35
6. *Experience based* learning techniques (*Direct supervisor-centered* learning process)	_____	5	25
7. *Direct supervisor-centered* learning process	_____	5	2

Instructions for Part III:

Part III consists of 20 Likert-style questions and seven open-ended questions that focus specifically on your job satisfaction and your relationship with your direct supervisor. For the Likert-style questions (presented below), please indicate how frequently you "Completely Agree," "Mostly Agree," "Sometimes Agree or Sometimes Disagree," "Usually Disagree," or "Completely Disagree" with each statement. Please click on the button that best describes your thoughts regarding your specific job satisfaction. For the open-ended questions, please answer each question as specifically and clearly as possible. **Part III: (Only to be taken by the participants who have been with the organization**

more than five years.)

	Completely Agree	Mostly Agree	Sometimes agree or sometimes disagree	Usually Disagree	Completely Disagree
1. I am appreciated in my job role.	5	4	3	2	1
2. I am provided with all of the resources I need to perform my job.	5	4	3	2	1
3. I feel stressed in my job.	5	4	3	2	1
4. Most days, I like my job.	5	4	3	2	1
5. My direct supervisor recognizes me as an individual.	5	4	3	2	1
6. I receive support and teamwork from my direct supervisor.	5	4	3	2	1
7. My direct supervisor makes me feel that my job is important.	5	4	3	2	1
8. The reporting structure is very clear between my direct supervisor and myself.	5	4	3	2	1
9. I feel comfortable voicing my concerns to my direct supervisor.	5	4	3	2	1
10. My direct supervisor encourages high performance.	5	4	3	2	1
11. My job responsibilities are clearly defined.	5	4	3	2	1
12. My direct supervisor communicates					

openly with me.	5	4	3	2	1
13. My direct supervisor asks for my feedback.	5	4	3	2	1
14. My direct supervisor offers objective feedback.	5	4	3	2	1
15. My direct supervisor cares about me as a person.	5	4	3	2	1
16. My direct supervisor makes an effort to identify my strengths and weaknesses.	5	4	3	2	1
17. My direct supervisor views his or her employees as assets.	5	4	3	2	1
18. I get the opportunity to do innovative things at work.	5	4	3	2	1
19. My views and participation are valued by my direct supervisor.	5	4	3	2	1
20. My direct supervisor has created an open and comfortable work environment.	5	4	3	2	1

Instructions for Part III Open-Ended Questionnaire:

Please provide a minimum of 2-3 sentence responses for each question provided. Please be as specific as possible with each response.

21. How would you describe job satisfaction?

22. Are you satisfied in your job role? (Please state YES or NO.) Why or why not?

23. Do you intend on working for this organization three years from now? (Please state YES or NO.) Why or why not? (Please be as specific as possible.)

24. What would you like to see improved within the PBS division?

25. What are your direct supervisor's greatest strengths as a leader?

26. What are your direct supervisor's greatest weaknesses as a leader?

27. Why have you chosen to remain with this division of the organization for as long as you have?

Appendix B: Permission to Use MIPI-EDS

LINDENWOOD
LINDENWOOD UNIVERSITY ST. CHARLES, MISSOURI

10/14/16

Ms. Erin Marie Klepper:

I am pleased that you wish to use the Modified Instructional Perspectives Inventory – Employees & Direct Supervisor (MIPI-EDS) in your doctoral dissertation research study regarding "*Andragogy and Employee Retention: A Mixed Methods Study Exploring the Employees' Perceptions of Their Relationships with Their Direct Report within a Not-for-Profit Health Care Facility.*" I hereby give you permission to use this copyrighted instrument. I would expect an appropriate citation for this tool in your dissertation or any publications that result from using it.

If there is any other way I may help you in this process, please let me know. My best wishes to you in your research.

Most Sincerely,

John A. Henschke, Ed. D.

Professor of Education and Chair of Andragogy Doctoral Emphasis Specialty
School of Education, Lindenwood University

Appendix C: Formal Permission to Use Image

Christopher Pappas ...
Founder of the eLearning Industry's Network elearningindustry.com

May 30

Permission to use one of your infographs on your website

Hi,
My name is Erin Klepper. I'm a doctoral student at Lindenwood University, focusing on Andragogy in the corporate environment. I found an infographic image on your website that I'd like to use in my dissertation. To be incredibly honest with you, I could recreate it if necessary, but I really like yours. Is there any way that I could receive formal permission to use the infographic found on https://elearningindustry.com/the-adult-learning-theory-andragogy-of-malcolm-knowles. It's the graphic that pertains directly to Malcolm Knowles' 4 Principles of Andragogy. I would appreciate any help you'd be able to provide to me.

Please feel free to contact me directly if you have any questions. You can reach me via email or by phone.
Thank you,
Erin Klepper
314-732-3934
eklepper03@gmail.com

May 31

Hi Erin, thanks for reaching out.

You are more than welcome to use it1

Best regards,
Christopher

6:54 AM

Thank you!!!!

6:57 AM

Vitae

Erin Klepper

Education
Lindenwood University
Doctorate of Education   December 2017
  Specialization in Andragogy/Adult Learning

Lindenwood University   Graduated May 2014
Masters of Arts in Education
  Specialization in Instructional Technology

Lindenwood University   Graduated May 2011
Master of Arts in Communication
  Specialization in Media Business Management/Training and Development

Lindenwood University   Graduated May 2009
Bachelor of Arts in Theatre/Speech/Secondary Education
  Certificate in Mild to Moderate Cross-Categorical Special Education (K-12)
  Certificate in Theatre/Speech Communications (9-12)

Relevant Professional Experience
SSM Health   April 2016-present
Corporate Educator (PBS)

St. Anthony's Medical Center   October 2015 – April 2016
HSA Business Support

Lindenwood University
Graduate Assistant, School of Education   October 2014-June 2015

St. Anthony's Medical Center   July 2011-October 2015
Education and Media Specialist

Lindenwood University   May 2007-December 2009
Resident Director

Professional Accomplishments and Activities

- "The Erin Klepper Heart of Service" award was named and officially distributed by the Sigma Alpha Chapter of APO in April 2016
- Lymphoma and Leukemia Society Volunteer—2013-present
- Healthstream Award of Excellence Recipient—Innovation in Learning 2013, 2014
- Distinguished Service Key Recipient- Alpha Phi Omega 2014
- Service of the Heart Recipient (SAMC)—April 2013
- Alpha Phi Omega Conference Facilitator/Presenter—2010-present
- Alpha Phi Omega LEADS presenter
- Alpha Phi Omega Section Staff Member—2010-present
- Developed Project: Leadership, all-inclusive mentoring program– SAMC
- Alpha Phi Omega Chapter Advisory Chair, University of Missouri—St. Louis—2009-2014
- Linden Leader Award Recipient, 2006, 2007