

ENGAGING BANYAN'S TOP PERFORMING CONSULTANTS:

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Abstract

Banyan Work Health Solutions is a provider of rehabilitation case management services for employers and insurers across Canada. Two factors make Banyan unique. First, the organization is staffed largely by independent contractors. Second, the organization's structure is virtual. Contracted consultants telecommute from home offices nationally. Banyan has set ambitious growth targets for the next five years, necessitating the effective engagement of high performing consultants. The purpose of this study is to identify factors driving engagement in this community. Sub-questions relate to identifying the current state of engagement and actions Banyan can take to enhance engagement in this community, and how these issues may effectively be applied to other employee groups. An action research methodology will be deployed to study these issues. Specifically, an engagement survey and focus groups will be used to gather relevant data. This study is of minimal risk and will adhere to all Royal Roads University (RRU) Ethical Guidelines.

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SECTION ONE: FOCUS AND FRAMING

Banyan Work Health Solutions (Banyan) is a provider of rehabilitation case and claims management services for employers and insurers across Canada. The business is 17 years old and is owner-managed. Independent contractors constitute some 80% of the personnel while the other 20% are regular full-time employees (Banyan Staff Retention Report, 2011). All of Banyan's Work Health Consultants (WHC) are independent contractors. The company's structure is virtual: the majority of individuals telecommute from home offices nationally. Because of this virtual structure, mainstream and innovative technologies are widely deployed (Tafti, Mithas & Krishnan, 2007).

While not specifically defined by Banyan, engagement is perceived as the degree to which contractors and employees feel committed to the organization, and are willing to strive for superior individual and organizational performance. There is a sense at Banyan that levels of engagement, specifically in its WHC community, have been negatively impacted by a variety of factors over the last five years (L. DiDiodato, personal communication, September 2011). During this period, a failed merger in the Quebec region, the loss of the business's largest client, the securing of a new, even larger and highly demanding client, and massive growth as a result of this client, caused much instability. Banyan has also set ambitious growth targets for the next three to five years. The leadership appreciates the need for fully engaged stakeholders to achieve these targets.

To gain more in-depth insight into the extent and impact of these issues, and to formulate strategies going forward, Banyan retained me as leader of Strategic Projects (Talent Management). In October 2011, I conducted an in-depth analysis of various Human Resources issues. I began calculating the company's first metrics around retention and tenure and I was given the company's employee engagement survey results for 2010.

The information gleaned from my analysis, the staff turnover metrics and information from the employee engagement survey pointed to two critical issues. There appeared to be a lack of engagement in the WHC community. This lack of engagement was evidenced by a below average response rate by the WHCs to the engagement survey, eliciting only three out of a total of 55 responses, and an above average turnover rate, fully 28% out of the annual total of 30%. Further, qualitative and engagement survey data reflect dissatisfaction with communication practices (Banyan Employee Engagement Survey 2010 Results Report). From these insights emerged the desire to improve engagement in the WHC community.

My personal interest in this inquiry is three-fold. I am the only internal resource fully dedicated to HR and talent management. As such, it is my job to improve people-related processes and outcomes. As student and researcher, I am in an ideal position to gather the information I need to drive these desired HR outcomes. Finally, I am an engagement enthusiast. This inquiry will allow me to immerse myself in this field.

The inquiry will address the key question, What factors drive engagement in Banyan's high performing WHCs? The sub-questions in support of the primary question are:

1. What is the current state of engagement of Banyan's high performing WHCs?
2. What current organizational practices do WHCs feel support engagement and should be continued into the future?
3. What new organizational practices do WHCs feel should be implemented at Banyan to support engagement?

Significance of the Inquiry

The purpose of this inquiry is to study WHC engagement at Banyan. The focus is specifically on Banyan's high performing WHCs. These individuals play strategic roles in Banyan's future and are earmarked retention targets. The intention of this research is to identify organizational factors potentially improving engagement in the sample community.

A further intention is to formulate policy from the findings to create an engaged environment at Banyan featuring improved feelings of engagement in this community. The benefits of increased workforce engagement have been widely documented and at Banyan are predicted to affect the company itself, the WHC community, and Banyan's clients.

Carter (2010, p. 14) claims that companies demonstrating high engagement outperform those with low engagement. Macey and Schneider (2008) confirm that engagement is a "causal antecedent of organizationally relevant behaviours and outcomes" (p. 13). Therefore, benefits of increased engagement levels at Banyan should include an improvement in productivity, higher profits (Gallup, 2009, cited in Roth, 2010, p.12) and decreased staff turnover (Wildermuth & Wildermuth, 2008, p. 50). Banyan needs to retain its high performing WHCs if the company is to achieve its goals for the next five years.

Banyan's WHCs could enjoy personal benefits of increased engagement by greater feelings of self-confidence and self-efficacy (Carter, 2010, p.14), and feelings of being involved, informed and part of a wider community (Roth, 2010, p.12). Further, Banyan's consultants may derive benefits from decreased turnover. Turnover puts added demands on those who remain, who may experience increased workloads, exhaustion, and decreased morale (Arthur, 2001; Brewster, Carey, Dowling, Grobler, Holland & Warnich, 2004; Kim, 2005). In summary the creation of an engaged work environment that fosters retention of staff can reverse some of these trends and improve wellbeing of the WHCs themselves.

Finally, Banyan's clients stand to gain from highly engaged WHCs. Wildermuth and Wildermuth (2008) show that high engagement is positively correlated with improved customer satisfaction. This is confirmed by Bennoit-Williams (2011) who makes reference to Heskett, Jones, Loveman, Sasser and Schlesinger's (2008) Service Profit Chain model, demonstrating that employee engagement is "foundational (...) to enhanc(ing) customer satisfaction" (p. 10).

Should this inquiry not proceed, and should Banyan not be able to positively impact engagement in the WHC community, the organization may continue to lose critical and rare skills at a rate of 28% per annum (Banyan Staff Retention Report, 2011). Factoring in replacement costs of between 150% and 250% of annual salary (Arthur, 2001, p. 220; Ramlall, 2004, p. 63), such losses are expensive and negatively affect profitability.

Banyan has set an ambitious agenda for the next five years. This agenda includes doubling the revenues and becoming the employer of choice in the industry (Banyan Strategic Planning Report, 2011). Should this inquiry and subsequent policy formulation on engagement not happen, Banyan could continue to lose intellectual capital and organizational learning capability, which are critical to support the agenda (Senge, 2009, p. 299).

Organizational Context

Many contextual factors contribute to and mitigate Banyan's engagement challenges. These are related to Banyan's structure, resourcing model, culture, strategy and philosophy.

Banyan is mostly a virtual business. Of the over-200 headcount, about two dozen individuals work in bricks-and-mortar offices; the rest telecommute from their homes. Managing such a dispersed workforce presents challenges, and technologies have been innovatively implemented to enable communication, collaboration and teamwork. While Banyan's consultants enjoy the flexibility associated with this arrangement, they also report feelings of isolation and loneliness (Banyan Strategic Projects Discovery Report, 2011).

Banyan has enjoyed substantial flexibility and cost advantage by using the independent contractor model. However, this contractor model has been a mixed blessing in terms of engagement. Positively, contractors are vendors to Banyan, the client, and continued revenue-generating relationships promote discretionary effort as a marker of engagement (Banyan White Label Capacity Building Report, 2011). Negatively, some of Banyan's independent contractors feel discontented because of employment insecurity and

earnings fluctuations due to changing client demands (Banyan Staff Retention Report, 2011).

Banyan has a very specific organizational culture. The business is highly entrepreneurial and new ideas and innovative thinking are encouraged (Banyan Business and Financial Planning Strategy Report, 2011). It is also non-corporate in that individuals are trusted to do their work appropriately, with only minimal oversight. The leadership team operates openly and with high integrity, honesty and ethics, and expects its partners and staff to do the same. These are all factors improving engagement at Banyan (Banyan Employee Engagement Survey 2010 Results Report).

In 2009, the Banyan leadership team made a strategic decision to aggressively grow the business through increased marketing efforts and pressure on sales. As the company started growing, the culture started changing (Banyan Strategic Projects Discovery Report, 2011). Some individuals felt uncomfortable with Banyan's shift away from a "family" culture towards a more corporate culture, resulting in person-culture conflict (Argyris, 1964, cited in Bolman & Deal, 2003, p. 126), withdrawal and disengagement (Banyan Strategic Projects Discovery Report, 2011).

At a leadership conference in April 2011, Banyan launched its new guiding philosophy of "Kaizenovation", which "marries the best of innovation (game changing initiatives) [*sic*] and kaizen (a focus and practice aimed at constant improvement) [*sic*]" (Banyan Strategy Document, 2011, p. 3). Saks (2006) advocates for "an environment that allows members to experiment and try new things" (p. 605) as a positive influence on engagement. While still in its early stages, Banyan's adoption of such a philosophy may start mitigating low engagement.

Systems Analysis of the Inquiry

"A system is composed of parts, but we cannot understand a system by looking only at its parts" (Wheatley, 1999, "Change: The Capacity of Life", para. 9). "Systems thinking

looks at relationships, connectedness, process, and the whole and patterns of a system”

(Ackoff, Addison & Carey, 2010, “Definitions”, para. 9). The issue of Banyan's subcontractor engagement resides at the centre of a complex interplay of forces emanating from various systems (Figure 1). The primary influencers derive from Banyan's market and technological environments. Secondary influencers stem from cultural and societal factors.

Banyan's WHCs operate within the parameters of two different systems, namely healthcare and insurance. Consultants' daily reality is coping with the tension created by the competing interests of these two systems. According to Ackoff (2010), systems are designed to achieve specific outcomes. The healthcare system is designed to achieve the physical and mental recovery of injured or ill workers. The insurance system is designed for profit maximization. On many occasions these are opposing forces.

Banyan is further impacted by factors in the insurance system. The industry consists of three large and a few small entities (Banyan Market Size Report, 2011). The majority of Banyan's revenue stems from one of the big three. Because of the close relationship between Banyan and this insurer, the two remaining large insurers are reluctant to retain Banyan. This impacts WHCs in two ways. Longstanding Banyan WHCs remember a similar situation in the company's history, where the-then major client cancelled Banyan's contract resulting in large-scale downsizing, restructuring and layoffs. A potential repetition of this scenario makes individuals unsettled. Also, Banyan is beholden to the current major client, resulting in extreme variations in workload, and subsequent variation in WHC earnings.

The technological environment has of late affected Banyan's WHCs. New software offerings have prompted both Banyan and Banyan's largest client to introduce computerized case management systems. While an organizational boon in terms of information management, these IT systems are forcing WHCs into defined workflows, and are clearly

highlighting WHC effectiveness in terms of key metrics. WHCs may find these new disciplines and amplified scrutiny of their performance intrusive.

“There are no isolated events in systems. Everything connects with everything else” (Oshry, 2007, “The Invisible Histories Of The Swims We Are In”, para. 1). A joint research report published by Banyan and Munich Re-insurance (2011) highlights two specific demographic shifts in Canadian social systems that will affect Banyan in general, and WHC engagement specifically. The first is the aging workforce, which presents both short-term opportunities and long-term challenges. In the short term, workplace-related injuries and incidents are statistically more likely in the older cohort resulting in increased business for Banyan and the WHCs. Short-term and long-term disability insurance cover however stops at age 65, meaning a significant loss of business for Banyan as Boomers reach this milestone age. Further, with a shift from physical work to knowledge work, rehabilitation emphasis will need to also shift from physical health to mental health. This may place some strain on Banyan's WHCs who mostly come from physical health backgrounds.

National culture is the “sum total of beliefs, rituals, rules, customs, artifacts and institutions that characterize a population” (Ivancevich & Matteson, 2005, p. 38). Recent research (Fraser, 2011) has shown that cultural factors impact the prevalence of short- and long-term disability claims. In Quebec, individuals are approximately twice as likely to take disability leave as in the ‘Rest of Canada’ (ROC). Most of these claims in Quebec fall into the mental health category. This presents opportunities for increased work for WHCs, but also increased emphasis on mental health rehabilitation skills.

Finally, Banyan's internal systems, specifically communication and management systems, have collided with cultural value systems in Quebec. While Banyan has a physical presence in Quebec, and much of the company's new business growth stems from that area, Banyan has struggled to align business processes and identities between its traditional

operations in ROC and Quebec. Cultural faux pas, miscommunications and misunderstandings have created a sometimes adversarial environment between Quebec stakeholders and ROC, resulting in non-compliance to company internal systems by some of the Quebecois, and significantly impacting engagement in both regions.

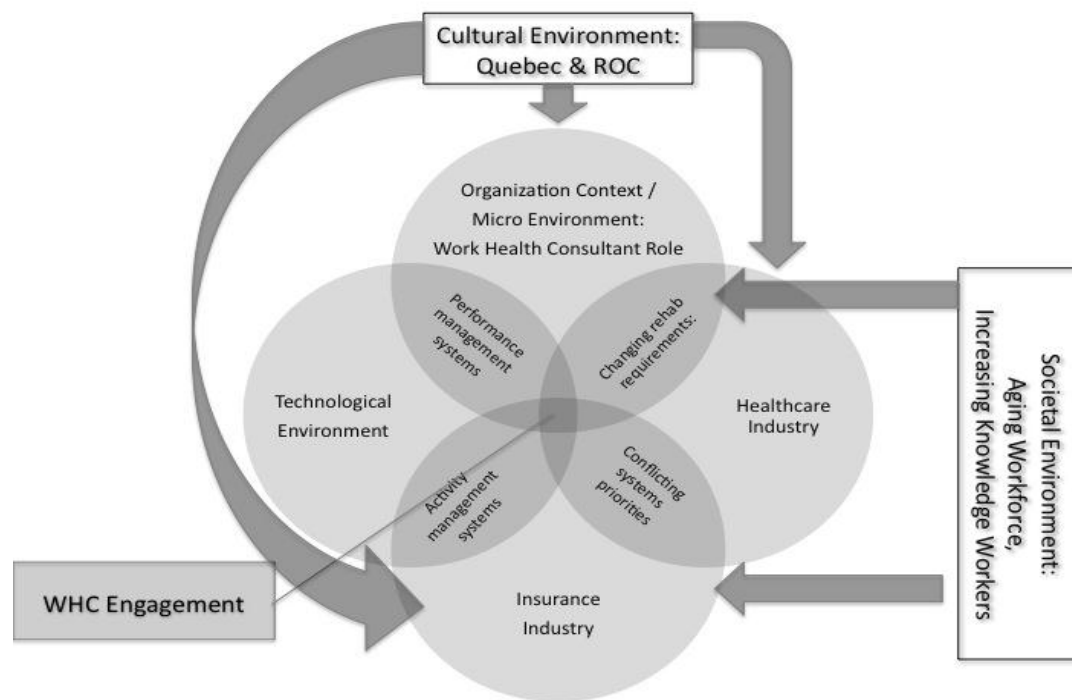


Figure 1: A system of WHC engagement

Project Sponsor

My project sponsor is Banyan's owner and Chief Operating Officer (COO), Maria Vandenhurk, who has worked tirelessly to make Banyan what it is today. I recognize the COO as an exceptionally strategic and courageous leader. She is continually on the lookout for growth opportunities for Banyan and potential strategic alliances. She recognizes a certain amount of resourcing risk in the current absence of formal HR strategies and structures. In order to position the business competitively in the market, and to mitigate the resourcing risks by enhancing engagement, she is cementing the company's future. Further, the COO is the ultimate gatekeeper to all of Banyan's resources. I have been most fortunate to be granted what Glesne (2011) terms "full and unqualified access" (p. 57).

SECTION TWO: LITERATURE REVIEW

The inquiry question for this research study is: What factors drive engagement in Banyan's high performing WHCs? The sub-questions in support of the primary question are (a) what is the current state of engagement of Banyan's high performing WHCs, (b) what current organizational practices do WHCs feel support engagement and should be continued into the future, and (c) what new organizational practices do WHCs feel should be implemented at Banyan to support engagement? This section provides an account of the literature as it relates to the topic of workforce engagement.

Topic One: Workforce Engagement

Rationale

Many authors concur that the concept of workforce engagement is linked to many positive organizational outcomes. Specific organizational factors, telecommuting, virtual organizational structures and subcontracted resourcing, such as they exist at Banyan, potentially affect engagement, and therefore merit analysis.

Models of engagement

There is little consensus around defining the concept of employee engagement. The popular media simply define engagement as "discretionary effort" (Towers-Perin, 2003, cited in Carter, 2010, p. 14). Some authors present engagement as a result of organizational processes, others as drivers of such processes (Wildermuth & Wildermuth, 2008), still others as a type of organizational culture (Roth, 2010).

Macey and Schneider (2008) explain it best by conceptualizing engagement as three separate constructs. Trait engagement refers to engagement as an inherent disposition or personality trait; state engagement is a positive emotional state influenced by the trait as well as certain work environmental factors; and behavioural engagement refers to observable discretionary effort, proactive behaviour and personal initiative displayed by engaged

employees. In their conceptualization, trait engagement is an antecedent of state engagement, which in turn is an antecedent of behavioural engagement.

The implications for Banyan of these conceptualizations are as follows. If engagement were a trait, then Banyan would do well to include it in recruitment efforts. Also, if discretionary effort is influenced by organizational environment factors, then learning how to create and leverage engaged environments is valuable. Finally, if state engagement is the antecedent to discretionary effort, and my sample for this inquiry is made up of those individuals who display discretionary effort, then identifying the level of state engagement makes sense.

Whatever the conceptualization, high employee engagement is positively correlated to positive organizational outcomes. These include low dysfunctional staff turnover (Carter, 2010; Roth, 2010; Wildermuth & Wildermuth, 2008), increased productivity and profitability (Gallup, 2009, cited in Roth, 2010, p.12), and improved competitiveness and innovation (Welch, 2011). Improved engagement is therefore likely to be of direct bottom-line benefit to Banyan.

Organizational drivers of engagement

Saks (2006) noted that, while engagement has been widely written about and practised in the business sphere, “there has been surprisingly little academic and empirical research” (p. 601). Common themes emerging from the literature are meaningfulness of work, quality of leadership and social relationships, trust and fairness in the work environment and the person-environment values fit (Carter, 2010; Gruman & Saks, 2010; Ludwig & Frazier, 2012; Macey & Schneider, 2008; Roth, 2010; Saks, 2006).

Saks (2006) distinguishes between job engagement and organization engagement, reflecting organizational members’ “work role and their role as a member of an organization” (p. 604). Saks (2006, p. 613) found that perceived organizational support predicts both job

and organization engagement, job characteristics predict job engagement, and procedural justice predicts organization engagement. Perceived organizational support is conceptualized as “an environment allowing members to experiment and try new things without fear of consequence” (p. 605). The environment also features trusting interpersonal relationships with managers and colleagues, and social support. Important job characteristics include challenging work, drawing on a variety of skills, allowing for personal discretion and opportunity to make important contributions. Procedural justice refers to the “perceived fairness of the means and processes used to determine the amount and distribution of resources” (p. 606).

These factors are supported by Gruman and Saks (2010), citing Kahn's (1990) ethnographic study. Kahn (1990) suggests three psychological conditions that serve as antecedents to engagement, namely psychological meaningfulness, psychological safety, and psychological availability. Similar to Saks' (2006) job characteristics, meaningfulness is impacted by task characteristics, role characteristics and work interactions. Psychological safety is associated with “reliable, predictable social environments that have clear boundaries of acceptable conduct in which people feel safe to risk self-expression” (Kahn, 1990, cited in Gruman & Saks, 2010, p. 126); this factor resembles both Kahn's (2006) perceived organizational support and procedural justice. Psychological availability is associated with the “physical, emotional and psychological resources people bring to their role performances” (Gruman & Saks, 2010, p. 216).

Ludwig and Frazier (2012) suggest that “behavioural engagement should be the research construct of interest because it is observable and is most directly related to human performance and the bottom line” (p. 77). Supported by Daniels (2009, cited in Ludwig & Frazier, 2012) who argues that “a key variable that drives all organizational outcomes is human behaviour” (p. 77), Ludwig and Frazier (2012) advocate for an Organizational

Behaviour Management approach to driving engagement. Accordingly, engagement is achieved through positive reinforcement of engaged behaviours, availability of necessary job resources, management behaviours, including ensuring task clarity and goal setting, and allowing individuals some degree of autonomy (Ludwig & Frazier, 2012, pp. 77-79).

Influence of telecommuting and subcontracting on engagement

While engagement is impacted by a variety of factors, two factors are of particular relevance to Banyan. These factors are the WHCs' working arrangements to telecommute, and their employment relationship as independent contractors.

Telecommuting can have both positive and negative influences on engagement. Christensen argues (2011) that telecommuting creates "invisible employees" (p. 133) who feel isolated from their peers (Gainey, Kelley & Hill, 1999; Lafferty & Whitehouse, 2000). Shekhawatsat and Markandeya (2009) concur, stating telecommuters have little connectivity to the wider organization and may therefore demonstrate a sense of disengagement.

The literature seems to be overwhelmingly in favour of telecommuting as positive contributor to engagement. Hill, Miller, Weiner and Colihan (1998) found past tense that telecommuting had no detrimental influence on individuals' levels of morale, while Gainey et al. (1999) concluded that telecommuting improved employee retention, which is an indicator of engagement. A Kenexa Research Institute study (2007), surveying some 10,000 U.S. workers, found that telecommuters outscored office-based employees on dimensions of pride in their organization, confidence in the organization's future, overall job satisfaction, and satisfaction with senior management. A pilot project conducted by the City of Ottawa allowing city bylaw enforcement officials to telecommute resulted in a 17% improvement in productivity, decreased absenteeism and increased engagement (Chianello, 2011).

The literature is inconclusive regarding differences in engagement between independent contractors and traditional employees. Feldman, Doerpinghaus and Turnley

(1994) claim that independent contractors may feel more disengaged than employees because of perceived employment insecurity, impersonal treatment, and feelings of being underemployed. Prottas (2007) observed significant positive differences in terms of “organizational commitment, job satisfaction and life satisfaction” (p. 24). In that study, “independent contractors expressed superior outcomes regarding attitudes towards their jobs, lives and families, [and] expressed more commitment to their occupations than employees” (Prottas, 2007, p. 24).

Conversely, Moore's (2009) study into the event production industry found “no correlation between worker classification and job satisfaction” (p. 121). Vaiman, Lammergaard and Azevedo (2011) concur, concluding from their study about Canadian management consultants “there is no significant difference regarding needs and motivation between traditional employees and contingent workers” (p. 319).

Banyan's virtual environment where WHCs telecommute and the contracted resourcing model may impact overall levels of engagement. Telecommuting seems to be a positive influencer, potentially mitigating low engagement. The contracted model may be a mixed blessing requiring further study to establish its exact impact.

Topic Two: Change Management

Rationale

Achieving change in the workplace requires high levels of sensitivity, professionalism and finesse. This inquiry will prepare the organization for change. An exposition of possible pitfalls, challenges, opportunities and solutions will enable the organization to better effect change.

Subtopics

Models of organizational change

Barriers to organizational change

Overcoming barriers to organizational change

Sources:

Bolman, L.G. & Deal, T.E. (2003)

Francis, D., Bessant, J. & Hobday, M. (2003)

Hagberg, R. (2006)

Ivancevich, J.M. & Matteson, M.T. (2005)

Nickols, F. (2004)

Schein, E. (2010)

SECTION THREE: INQUIRY APPROACH AND METHODOLOGY

Inquiry Approach

Reason and Bradbury (2008, cited in Coghlan & Brannick, 2010) define action research as a “participatory, democratic process concerned with developing practical knowing in the pursuit of worthwhile human purposes, grounded in a participatory worldview” (p. 3). From an analysis of the literature (Burnes, 2004, cited in Burke, Lake & Payne, 2009; Coghlan & Brannick, 2010; Eriksson & Kovalainen, 2008; Glesne, 2011; Schein, 2010; Stringer, 2007), three themes emerge that advocate for the use of action research in my inquiry.

First, action research is a democratic, collaborative process, where the researcher becomes an active participant. This approach fits with my role as leader of strategic projects at Banyan. By the nature of my job, I am an active participant in the Banyan system. My work to date has been characterized by collaboration with other organizational stakeholders.

Second, action research is appropriate for studying a specific situation in a specific context at a specific time. Banyan is a unique organization. The organizational structure is mostly virtual. The majority of the workforce consists of independent contractors. Banyan has recently expanded its operations in Quebec and contains very distinct national cultures. The inquiry will inform how to drive engagement at this point in time given these factors.

Third, action research is used to generate practical approaches to a specific issue. Banyan has some specific business requirements. These include the need to retain key individuals for both cost reduction and capacity building reasons. The findings of this study will support these business imperatives and promote growth, innovation and diversification.

I plan on using an Appreciative Inquiry (AI) approach to conduct this inquiry. “AI is about the coevolutionary search for the best in people [and] their organizations” (Cooperrider & Whitney, 2000, p. 3). My experience of Banyan culture is exceptionally positive. Yet

individuals at Banyan do not seem to fully appreciate their own positive stories. I believe AI is ideally suited to bringing positive potential to the surface and leveraging it for engagement. I intend making use of Cooperrider and Whitney's (2000) "4D" model of appreciative inquiry categorized into "discover, dream, design and destiny" phases.

"The core task of the discovery phase is to discover and disclose positive capacity" (Cooperrider & Whitney, 2000, p. 7). I intend uncovering "the best of what is" (Cooperrider & Whitney, 2000, p. 30) through a process of asking appreciative questions in focus groups. I also plan to discover current levels of engagement in the sample group through a survey.

During the dream phase, through the use of focus groups, I intend to leverage "the best of what is" at Banyan to envision "what might be" (Cooperrider & Whitney, 2000, p. 30). In Cooperrider and Whitney's (2000) model, this phase consists of achieving three things, namely "a vision of a better world, a powerful purpose, and a compelling statement of strategic intent" (p. 10).

Once the strategic focus or dream is articulated "attention turns to the creation of the ideal organization, the social architecture or actual design of the system in relation to the world it is part" (Cooperrider & Whitney, 2000, p. 10). I anticipate this design phase of my inquiry involving the interpretation of data and extrapolation of practices, structures and processes that may be important for engagement at Banyan into the future.

Cooperrider and Whitney (2000) describe the destiny phase as "the path of positive protest, or a strategy for positive subversion" (p. 12). While the destiny phase falls outside this project's scope, I intend to see Banyan through further stages of positive evolution.

Participants

The participants for this inquiry are those WHCs displaying discretionary effort, or behaviour engagement, namely the highest performing WHCs. "Interpretivist researchers tend to select each of their cases purposefully. The logic and power of purposeful sampling

... [*sic*] leads to selecting information-rich cases for study in depth" (Patton, 2002, cited in Glesne, 2011, p. 44). I will use homogenous sampling, which is a process that selects "all similar cases in order to describe some sub-group in depth" (Clark, 1999, cited in Glesne, 2011, p. 45).

Banyan's top performing WHCs are those with the highest case volumes, the highest absorption of new referrals, the fastest turnaround times, the highest recovery rates, and the highest quality assurance scores. To ensure representativeness, all of Banyan's 20 to 25 high performing WHCs will be invited to participate in both the survey and the focus groups. These invitations will be sent via email. Factoring a 30% non-response rate, I anticipate a final sample size of approximately a dozen to 17 individuals.

The selection process does not require deception, nor does it involve "undue influence", "conflict of interest", or "vulnerable populations" (Rowe & Agger-Gupta, 2008, pp. 4-6). To ensure informed consent, I will use templates provided by RRU, as attached in the appendices of this document. I am aware that potential participants are not employees of Banyan; rather, they are contractors. The issue of compensation for time spent in participation will need to be addressed.

Inquiry Team

I anticipate the need for an inquiry team to assist at two separate stages of this research inquiry. To assist in testing survey and focus group questions I will likely draw on members of the RRU Master of Arts in Leadership 2012/13 cohort. Because of our prior collaborations and physical proximity these individuals are likely to be Andrea Leven-Marcon and James Voulakos. I would also enlist the collaboration of some WHCs who fall outside of my defined sample in this testing process. The exact individuals have not yet been identified, but will include both English and French speakers.

To assist in the post-analysis formulation of engagement recommendations and

strategy, I intend collaborating with Banyan's four Vice Presidents (VPs) and the COO herself. These individuals will also be part of my Inquiry Team.

Inquiry Methods

Inquiry methods used for this study will consist of a combination of a survey and focus groups. It is anticipated that questions for each method will undergo cycles of testing and refinement before being deployed for the actual inquiry.

Data Collection Tools

Online Survey Questionnaire

Organizational surveys are defined as “a number of methods of systematically gathering data from members in the organization” (Kraut, 1996, cited in Burke et al., 2009, p. 301). Surveys can include questionnaires, personal and group interviews. Survey feedback “gives objective data about the system's functioning to the system members so that they can change or improve selected aspects of the system” (French & Bell, 1990, p. 171).

Many reasons exist for using surveys in action research (Nadler, 1977, cited in Burke et al., 2009; Schein, 2010; Weisbord, 2004). These are to pinpoint areas of concerns, observe long-term trends, monitor program impact, provide input for future decisions, add a communication channel, perform organizational behaviour research, assist organizational change and improvement, and provide symbolic communication.

The use of a survey is appropriate at Banyan for three reasons. First, Banyan is a metrics-driven organization; data may be considered more credible when presented from this medium. Second, building engagement at Banyan is a long-term process of measuring, analyzing, acting and refining. Aligning with Nadler (1977, cited in Burke, 2009, pp. 303 – 307), surveys are ideal for determining a benchmark on an issue and measuring impacts of interventions over time. Third, “a survey may provide a useful tool for extending the data collection process to a broader range of participants” (Stringer, 2007, p. 79). Banyan's

engagement strategy will ultimately extend to include engagement of all employee groups.

Schein (2010, pp. 160-161) raises concerns about surveys. These issues include not knowing what to ask, employees not being motivated to be honest, employees misunderstanding questions or interpreting them differently, resulting data being accurate but superficial, the sample not being representative, results not revealing interaction or patterning with the total system, and the unknown impact taking the survey has on participants. This latter point is echoed by Kraut (1996, cited in Burke et al., 2009, p. 300), when he refers to surveys as a potential “hand grenade”. To mitigate these issues, I will test the survey in my Inquiry Team and add one further data gathering method, namely focus groups.

Schein (2010) questions a survey's ability to “reach deeper levels of shared tacit assumptions that may only reveal themselves in actual interactions” (p. 175). He maintains that uncovering these assumptions “requires the addition of individual or group interviews” (Schein, 2010, p. 188). Weisbord (2004) concurs, arguing that “face-to-face discussions, not surveys, are the key to constructive change” (p. 208). Hence the addition of focus groups.

Focus Groups

Informed by the information gained through the survey, group interviews, also called focus groups (Glesne, 2011, p. 130; Stringer, 2007, p. 73), are the second step in my data gathering process. ‘Focus group’ is the “general term given to a research interview conducted with a group” (Terrblanche & Durrheim, 1999, p. 388).

Focus groups “are particularly useful in action and evaluation research where participants can express multiple perspectives on a similar experience” (Glesne, 2011, p. 130). Comparing group interviews to individual interviews, Schein (2010) promotes the group interview by claiming them to be “faster and more valid because an interactive process gets to shared assumptions more quickly” (p. 315).

“Whereas in interviewing an individual we develop an understanding of subjective experience, when we work with groups we can gain access to intersubjective experience” (Terreblanche & Durrheim, 2004, p. 388). Tapping into this “intersubjective experience” will not only allow me to uncover common stories of high engagement at Banyan and common visions for an engaged environment, but also potential differences.

Study Conduct

I envisage this study encompassing three distinct stages. The first involves the logistical planning of the research. The second is the inquiry itself. The final stage encompasses post-inquiry feedback, and building a connection to post-inquiry strategy formulation and implementation.

Pre-inquiry logistics will most likely occur in the following order. The thesis proposal requires approval from my thesis supervisor, an external supervisor, my sponsor, and the RRU ethics review committee. Once these approvals have been secured, preferably by mid September 2012, the Inquiry Team will be officially invited and confirmed. At that point, testing of survey and focus group questions will proceed, and questions will be refined for use in the inquiry. Concurrently, the subject of independent contractor payment for time spent participating will be concluded with the COO.

The inquiry stage includes data collection, data analysis, and documenting conclusions and recommendations. I anticipate collecting all data in October 2012. The first step in data collection is the engagement survey. All of Banyan's 20 to 25 top performing WHCs will be invited to participate. Invitations will be sent via email. The survey will be conducted via the Survey Monkey platform.

After the survey responses have been collected, I anticipate a period of review, resulting in the refinement of the focus group's questions. This is in line with Glesne's (2011) assertion that “data analysis done simultaneously with data collection enables you to

focus and shape the study as it proceeds” (p. 188).

The second and final step in the data collection process is the focus group. The same sample group of 20 to 25 top performing WHCs will be invited to participate. Invitations will be sent via email. Factoring in non-responses and declines, I anticipate conducting two focus groups of between five and seven individuals each. Because of the geographical dispersion of the participants, focus groups will be held via Banyan's GoToMeeting web conferencing platform.

Once all data have been collected, they will be transcribed and analyzed as outlined in the Data Analysis section below. This is anticipated for November 2012. At this time, I will create a first draft of conclusions and recommendations to be presented to the Inquiry Team for discussion. I intend specifically to debrief and elicit input from the four Banyan VPs and the COO.

Finally, in the post-inquiry phase, I anticipate writing all relevant chapters of the thesis document. During this time, I expect numerous loops of refinement of these chapters. I also plan on presenting the preliminary findings and recommendations to the Banyan leadership and research participants. Because this inquiry falls into a larger strategic process at Banyan, these presentations will elicit feedback to inform the next loop in creating an engagement strategy at Banyan.

Data Analysis

“Data analysis involves organizing what you have seen, heard, and read so that you can figure out what you have learned and make sense of what you have experienced” (Glesne, 2011, p. 184). I will use “thematic analysis” (Glesne, 2011, p. 187), or “theme identification” (Bernard & Ryan, 2003) for qualitative information.

“At the heart of qualitative data analysis is the task of discovering themes” (Bernard & Ryan, 2003, para. 1). In this process, “the researcher focuses analytical techniques on

searching through the data for themes and patterns” (Glesne, 2011, p.187). Bernard and Ryan (2003, para. 1) define themes as “abstract, often fuzzy constructs, which investigators identify before, during and after data collection”.

According to Bernard and Ryan (2003, para. 2) texts are the primary sources of themes. Because the transcriptions of my data collection qualify as text, I will draw on Bernard and Ryan's (2003) suggested approaches to discovering themes. These include identifying word repetitions, indigenous categories, keywords-in-context, searching for missing information, metaphors and analogies, transitions, and connectors. Text analysis will conclude at “theoretical saturation (...), [which is] the point at which no new themes are being identified” (Bernard & Ryan, 2003, para. 65).

Once thematic analysis is complete, I envision a second phase of analysis outlined by Stringer as “analyzing key experiences” (Stringer, 2007, p. 103). In this phase, focus is placed on “events that seem to have a marked impact on the experience of major stakeholders” (Stringer, 2007, p. 103). Denzin (1989, cited in Stringer, 2007) refers to these as “turning point experiences (...), which may appear as moments of crisis, triumph, anger, confrontation, love, warmth or despair that have a lasting impact on people” (p. 103). It is my hope that, by unpacking these experiences, I will gain a deeper understanding of the drivers of engagement at Banyan, with a view to future strategy.

Analysis of engagement survey data is likely to be qualitative and will focus on some specific issues. Of particular interest is to identify the current level of engagement in the sample group along defined factors. Further, the leadership team is concerned about levels of engagement in Quebec subsequent to the failed merger. The survey data may illuminate whether this concern is justified. The survey data may also show whether tenure at Banyan influences levels of engagement in the sample group. Finally, the survey data may highlight the influences on engagement, if any, of telecommuting and contracting.

Ethical issues

In Canada, research involving human subjects is guided by the Tricouncil Policy Statement for Ethical Conduct involving Humans (TCPS, 2010). At RRU, such research is governed by the Royal Roads University Research Ethics Policy (RRU REP, 2010).

Respect for persons

The TCPS (2010) defines “respecting autonomy [as] giving due deference to a person’s judgment and ensuring that the person is free to choose without interference” (p. 8). An important mechanism for respecting participants’ autonomy in research is “the requirement to seek their free, informed and ongoing consent” (p. 9). This aligns with the RRU REP (2010) concept of “undue influence”, and is particularly relevant in the recruitment process.

None of the project participants report directly to the project sponsor or me. None of the participants fall into a “vulnerable” category (RRU REP, 2010). Participants will be fully informed about the nature and intent of research through informed consent forms and ongoing communication. I will ensure these communications are translated for francophone participants. While I do not intend providing incentives, independent contractors may qualify for a small honorarium for their participation.

Respect for welfare

Concern for welfare means that researchers “should attempt to achieve the most favorable balance of risk and potential benefit” (TCPS, 2010, p. 10). WHCs could benefit greatly from participating in this study. If implemented, this study’s recommendations could greatly enhance the quality of their working experience at Banyan. Participants may also receive a small honorarium for their time.

In compliance with all regulations, participation and information received from participants will remain confidential. Where this is not possible in the focus groups, this will

be communicated transparently, and individuals will have the choice to withdraw. To mitigate, it may be necessary to have participants sign mutual non-disclosure agreements.

Justice

Justice refers to the obligation to treat people fairly and equitably. Fairness entails treating all people with equal respect and concern. Equity requires distributing the benefits and burdens of research participation in such a way that no segment of the population is unduly burdened by the harms of research or denied the benefits of the knowledge generated from it. (TCPS, 2010, pp. 10-11)

Individuals not invited to participate in this study may feel disadvantaged. Perhaps a mitigator could be to involve individuals who fall outside the boundaries of my sample in the initial testing phases.

Conflict of interest

The RRU Ethics Framework Statement (RRU EFS, 2008) discusses two scenarios for conflict of interests. A conflict of interests may occur where “the interests of the participants vary from the interests of the organization”, or where “a learner/researcher invites research participation from an employee with whom the researcher has a direct reporting or supervising relationship” (RRU EFS, 2008, p. 4).

On both counts, I am not in a position of conflict. First, my official and expressed agenda at Banyan is to create a healthy work environment in which everybody can feel engaged. My thesis research will form part of the foundation of future efforts in this arena. I posit that the interests of the organization in sponsoring this thesis project and those of the participants are aligned. Second, none of the research participants have a reporting relationship to me. Many of the participants may not know me. There is no potential for harm in this arrangement.

The RRU Request for Ethical Review for Research Involving Humans (2011, p. 2) document identifies potential conflict of interests stemming from the researcher and research participants belonging to the same employee group. I foresee no conflict of interests in this

regard. I am an employee under the corporate structure. The research participants are independent contractors within the divisional structures. We have no history of previous interaction or formal collaboration.

Project deliverables

Upon completion of this thesis, I will provide a hard and soft copy to Banyan's leadership team and to all research participants. I will present findings to the leadership team during a special meeting. I plan to present findings to participants via a webinar. The thesis will be published and archived in the RRU Library and in the Thesis Canada Portal of Library and Archives Canada, and ProQuest/UMI. Participants will be made aware of these in the informed consent communication.

Project milestones and schedule

A list of project milestones and corresponding schedule is represented in Table 1.

Table 1. *Project Milestones*

Date	Event
August 8, 2012	Submit initial proposal
August 22, 2012	Completion of Thesis Proposal with Supervisor approval SPATTS. Communicates completion to Committee Chair.
August 22, 2012	Proposal approval from Sponsor
August 22, 2012	Submission of Thesis Proposal
August 22, 2012	Dissemination of Proposal for external review
September 5, 2012	External review of Proposal
September 14, 2012	Dissemination of reviewer comments
September 14, 2012	In consultation with Supervisor, revision of Proposal (if changes required) and finalization of Ethics request and appendices.
September 14, 2012	Approval of Proposal and Request for Ethics Review document
September 30, 2012	Review by Ethics Committee and feedback provided to Student, Supervisor and Chair (If a Secondary Review required, request will be provisionally approved pending Secondary approval or modifications)
September 2012	Write and edit second literature review topic
October 5, 2012	Refinement/reworking of Ethics Documentation if required, minor changes to protocols; or revision and resubmission to Ethical Reviewer
October 5, 2012	Approval of Thesis Proposal and Ethics documentation from

Date	Event
	REB member to Student and Supervisor
October 8, 2012	Research proceeds when approval awarded
October 8, 2012	Update Ethics documentation as required
October 12, 2012	Data collection – finalize questions and pilots
October 19, 2012	Data collection – conduct survey
October 26, 2012	Data collection – conduct focus groups
November 9, 2012	Data analysis
November 16, 2012	Write (update) Sections 1-3
December 16, 2012	Write and edit Section 4 (Results & Conclusions)
January 2012	Review findings and draft recommendations with Sponsor & key stakeholders.
January 16, 2012	Write and edit section 5 (Inquiry Implications)
February 16, 2012	Write Reflective Practice Integrative Paper
February 16, 2012	Final Review and Edits with supervisor
February 18, 2012	Final product to supervisor and sponsor
Ongoing	Updating Supervisor, Sponsor and Inquiry Team on status of Project
February 18, 2012	Approval of final draft of Thesis by Sponsor (their final assessment submitted by email to Leadership.admin@royalroads.ca
February 18, 2012	Thesis reviewed by External Reviewer
February 22, 2012	Dissemination of External Reviewer comments.
February 22, 2012	Approval of final Thesis by Supervisor Or, entry into Thesis Defense process.
February 28, 2012	Reflective Paper completed
February 28, 2012	Revisions completed
February 28, 2012	Approval of revised Thesis

Project resource requirements and budget

A list of project resources and estimated budgets are provided in Table 2.

Table 2. Project resource requirements and budget

Item	Estimated Expense	Source
Honorarium for participants (12 x 1h x \$40/h)	\$480	Sponsor
Dragon voice to text software	\$250	Student
External hard drive	\$90	Student
Printing final report	\$100	Student
Total Estimated	\$1420	

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APPENDIX A: DRAFT LETTER OF INVITATION (GENERIC)

[Date here]

Dear [Prospective Participant],

I would like to invite you to be part of a research project that I am conducting. This project is part of the requirement for a Master's Degree in Leadership (MAL), at Royal Roads University (RRU). My credentials with RRU can be established with Niels Agger-Gupta at +xxxx

The objective of my research is to study factors that work health consultants feel make for a positive work environment, and improve their satisfaction at Banyan. The title of the research is "engaging Banyan's top performing work health consultants".

In addition to submitting my final report to Royal Roads University in partial fulfillment for a MAL, I will also be sharing my research findings with Banyan. A copy of the final report will be published and archived in the RRU Library, as well as in the Thesis Canada Portal of Library and Archives Canada, and ProQuest/UMI. Upon conclusion of the final report, I will conduct a debriefing session for all interested research participants.

My research project will consist of a survey and focus groups. Your name was chosen as a prospective participant because of your work with Banyan as a work health consultant. If you are interested in participating you will be asked to participate in both the short survey and the focus group. The survey will take between 5-10 minutes; the focus group will take one hour.

Information will be voice-recorded and transcribed and, where appropriate, summarized in anonymous format, in the body of the final report. At no time will any specific comments be attributed to any individual unless your specific agreement has been obtained beforehand. All documentation will be kept strictly confidential.

Subsequent to the thesis being published, the data will be destroyed. Data/information will not be retained pertaining to an individual who has withdrawn at any time.

You will be paid your regular hourly fee for your participation. Please feel free to contact me at any time should you have additional questions regarding the project and its outcomes.

You are not compelled to participate in this research project. If you do choose to participate, you are free to withdraw without prejudice, for up to three months prior to the completion of the study. Similarly, if you choose not to participate in this research project, this information will also be maintained in confidence.

If you would like to participate in my research, please confirm this by return email to:

Name: Carola Moore

Email: xx

Sincerely,
Carola Moore

APPENDIX B: DRAFT PREAMBLE AND CONSENT (SURVEY)

My name is Carola Moore, and this research project is part of the requirement for a Master of Arts in Leadership (MAL) at Royal Roads University. My credentials with Royal Roads University can be established by telephoning Niels Aggar-Gupta at +xxx

The research will include this survey and is foreseen to take 10 minutes to complete. The questions will refer to factors that work health consultants feel make for a positive work environment, and improve their satisfaction at work. The title of the research is "engaging Banyan's top performing work health consultants". In addition to submitting my final report to Royal Roads University in partial fulfillment for a MAL, I will also be sharing my research findings with Banyan Work Health Solutions.

A copy of the final report will be published and archived in the RRU Library, as well as in the Thesis Canada Portal of Library and Archives Canada, and ProQuest/UMI.

The information you provide will be summarized, in anonymous format, in the body of the final report. At no time will any specific comments be attributed to any individual unless your specific agreement has been obtained beforehand. All documentation will be kept strictly confidential.

Subsequent to the thesis being published, the data will be destroyed. Data/information will not be retained pertaining to an individual who has withdrawn at any time.

The survey will be conducted via the Survey Monkey platform. Because Survey Monkey houses their data in the USA, you are advised that the US governments, courts, or law enforcement and regulatory agencies may be able to obtain disclosure of the data through the laws of the United States.

You are not compelled to participate in this research project. If you do choose to participate, you are free to withdraw without prejudice, for up to three months prior to the completion of the study. Similarly, if you choose not to participate in this research project, this information will also be maintained in confidence.

Answering "yes" to question 1 on the survey indicates that you consent to participate in the survey. Answering "no" to question 1 indicates that you do not wish to participate in the survey and will end the survey experience.

If you have any questions about this research, please contact me at xxxx

Sincerely,
Carola Moore

APPENDIX C: DRAFT QUESTIONS (SURVEY)

1. Preamble and Consent
2. Please indicate in which province you live by clicking on the appropriate response below.
 - i. British Columbia
 - ii. Alberta
 - iii. Saskatchewan
 - iv. Manitoba
 - v. Ontario
 - vi. Quebec
 - vii. Nova Scotia
 - viii. New Brunswick
 - ix. Newfoundland & Labrador
3. Please indicate how long you have worked with Banyan by clicking on the appropriate response below.
 - i. <6 months
 - ii. 6-12 months
 - iii. 13-24 months
 - iv. +25 months
4. When you think about your work with Banyan in general, please rate the statements from A - K, by clicking on the response you feel is most appropriate.

A.

I always feel
informed of all
issues relevant
to my work with
Banyan

I never feel
informed of
issues relevant to
my work with
Banyan

10	9	8	7	6	5	4	3	2	1
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B.

I have a many
opportunities for
rich dialogue with
other stakeholders
at Banyan

I have no
opportunities for
rich dialogue with
other stakeholders
at Banyan

10	9	8	7	6	5	4	3	2	1
----	---	---	---	---	---	---	---	---	---

C.

I always feel that
my work contributes
to Banyan's strategic
objectives

I never feel that
my work contributes
to Banyan's strategic
objectives

10	9	8	7	6	5	4	3	2	1
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D.

I always feel
feelrecognized for my
individual contribution
at Banyan

I never

recognized for my
individual contribution
at Banyan

10	9	8	7	6	5	4	3	2	1
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E.

I feel my professional
aspirations are perfectly
aligned with Banyan's
strategic objectivesI feel my professional
aspirations are not at all
aligned with Banyan's
strategic objectives

10	9	8	7	6	5	4	3	2	1
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F.

I feel my skills
are perfectly matched
to my workI feel my skills are
not matched at all
to my work

10	9	8	7	6	5	4	3	2	1
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G.

I always feel part of
the team at BanyanI never feel part of
the team at Banyan

10	9	8	7	6	5	4	3	2	1
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H.

I have a strong
relationship with my
manager at BanyanI do not have a strong
relationship with my
manager at Banyan

10	9	8	7	6	5	4	3	2	1
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I.

I have access to all
developmental activities
that support my
achievement at workI have no access to
developmental activities
that support my
achievement at work

10	9	8	7	6	5	4	3	2	1
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J.

I have access to
professional growth
opportunities at Banyan
as a result of excelling at my jobI have no access to
professional growth
opportunities at Banyan
despite excelling at my job

10	9	8	7	6	5	4	3	2	1
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K.

I can do my best work
everyday at BanyanI am not able to do my
best work everyday at Banyan

10	9	8	7	6	5	4	3	2	1
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L.

Working from home
positively impacts my feelings
of job satisfaction at BanyanWorking from home
negatively impacts my feelings
of job satisfaction at Banyan

10	9	8	7	6	5	4	3	2	1
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M.

Being a contractor
increases my feelings of
commitment to BanyanBeing a contractor
decreases my feelings of
commitment to Banyan

10	9	8	7	6	5	4	3	2	1
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5. Please focus on a high point, a time in your work experience at Banyan where you felt most energized, most positive, most engaged, or most successful. Can you tell me about that time?
 - a. Please describe the situation
 - b. What particularly made you feel so positive?
 - c. Who else was involved?
6. What do you most value about yourself, your work, and Banyan as an organization?
7. What further comments about your work at Banyan and particularly positive incidents do you feel are important to share?

APPENDIX D: DRAFT RESEARCH CONSENT FORM (FOCUS GROUP)

My name is Carola Moore, and this research project is part of the requirement for a Master of Arts in Leadership (MAL) at Royal Roads University. My credentials with Royal Roads University can be established by telephoning Niels Agger-Gupta at +xxxx

This document constitutes an agreement to participate in the focus group phase of my research project, the objective of which is to study the issues health consultants feel make for a positive work environment, and improve their satisfaction at work. The title of the research is "engaging Banyan's top performing work health consultants". The focus group is predicted to last one hour. Because of the inclusion of a many participants in the group, individual anonymity cannot be assured. However, collected data will be coded to eliminate personal identification, and reported anonymously.

In addition to submitting my final report to Royal Roads University in partial fulfillment for a MAL, I will also be sharing my research findings with Banyan Work Health Solutions. Upon completion, participants will receive a copy of the final report upon request.

A copy of the final report will be published and archived in the RRU Library, as well as in the Thesis Canada Portal of Library and Archives Canada, and ProQuest/UMI.

Information will be voice-recorded and transcribed and, where appropriate, summarized, in anonymous format, in the body of the final report. At no time will any specific comments be attributed to any individual unless specific agreement has been obtained beforehand. All documentation will be kept strictly confidential. Subsequent to the thesis being published, the data will be destroyed. Data/information will not be retained pertaining to an individual who has withdrawn at any time.

You are not compelled to participate in this focus group. If you do choose to participate, you are free to withdraw without prejudice, for up to three months prior to the completion of the study.

By signing this letter, you give free and informed consent to participate in this focus group, as described.

If you have any questions about this research, please contact me at xxxx

Name: (Please Print): _____

Signed: _____

Date: _____

APPENDIX E: DRAFT FOCUS GROUP QUESTION

The following draft questions will be modified by the findings from the survey, in consultation with the Supervisor and Sponsor.

A. Thanks to the participant for their time and participation.

B. Introduction of my role as researcher and student, as differentiated from internal role at Banyan as an employee, internal consultant and project manager.

1. Please introduce yourselves to the group. Specifically,
 - a. How long you have worked with Banyan?
 - b. What geographical area you operate from?
2. During your association with Banyan, it would be natural for you to have experienced some ups and down. But for the moment I would like you to focus on a high point, a time in your work experience here where you felt most energized, most positive, most engaged, or most successful. Can you tell me about that time?
 - a. Describe the situation?
 - b. What was your task at that point?
 - c. What did you do?
 - d. What was the result?
3. What was it organizationally that made this event stand out? How did the organization impact this issue?
4. What are those things about us that no matter how much we change, we want to continue into our future?
5. Lets assume that today we woke up and it is 2015. Banyan has become exactly as we would like it to be - all of its best qualities are magnified, extended, multiplied - the way we would like to see them. As you come to Banyan today, what do you see that is different, and how do you know?

These questions are based on Cooperrider & Whitney (2000, p.9).

APPENDIX F: DRAFT INQUIRY TEAM MEMBER LETTER OF AGREEMENT

In partial fulfillment of the requirement for a Master of Arts in Leadership Degree at Royal Roads University, Carola Moore (the Student) will be conducting an inquiry research study at Banyan Work Health Solutions to study factors that work health consultants feel make for a positive work environment, and improve their satisfaction at work. The Student's credentials with Royal Roads University can be established by calling Dr. Niels Agger-Gupta, Program Head, MA Leadership at xxxx

Inquiry Team Member Role Description:

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

Confidentiality of Inquiry Data:

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

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

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

Statement of Informed Consent:

I have read and understand this agreement.
