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Examining Evidence-Based Change Agency Practice in Anglo and Non-Anglo Countries: Implications for Professional HRD Practitioners

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5.1 Introduction

Following a comprehensive review of the intended purposes and processes constituting 24 human resource development (HRD) definitions published between 1964 and 2004, and as a means of provoking further thought on What is HRD?, Hamlin and Stewart (2011) offered an all embracing, catch all, composite but non-definitive conceptualisation of this field of study and practice as follows:

‘HRD encompasses planned activities, processes and/or interventions designed to have impact upon and enhance organisational and individual learning, to develop human potential, to improve or maximise effectiveness and performance

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at either individual, group/team and/or organisational level, and or to bring about effective, beneficial personal or organisational behaviour change and improvement within, across, and/or beyond the boundaries of private, public and third sector organisations, entities and other types of host system’. (p. 213)

More recently, Hamlin (2019, p. 8) has offered a definition of HRD which asserts that:

Contemporary HRD is ‘the study or practice concerned with the diagnosis of performance-related behaviour change requirements at individual, group and organisational level within any host entity, and the design, delivery and evaluation of formal and/or informal learning activities to meet the identified needs’. (Hamlin 2017)

These two conceptualisations of HRD are consistent with, but broader than, the concept of ‘organisation development’ (OD) which is widely understood to be concerned with the theory and practice of planned systematic change in the attitudes, beliefs and values of employees through the creation and reinforcement of long-term training programmes. As such, many consider OD to be one of the numerous HRD approaches for bringing about effective and beneficial planned change through learning. Additionally, the two conceptualisations of HRD reflect the critical contribution that the HRD function and professional HRD practitioners can and should make in the facilitation of (1) ‘organisational change’ (OC) which is a term typically referring to the process in which an organisation changes its structure, strategies, operational methods, technology or organisational culture and of (2) ‘organisational development’ which typically relates to any ongoing process of implementing effective change in how an organisation operates including OD. As Hamlin (2001a) argues, there are HRD implications implicit in all organisational change and development (OCD) initiatives whether executed at individual, group or organisation level:

‘For every change, both large and small, either ‘new’ knowledge, attitudes, skills and habits (KASH) have to be acquired as in the case, for example, when new products, services, technologies, structures or systems are introduced; or alternatively ‘existing’ knowledge, attitudes, skills and habits must be re-dis-
tributed, as in the case of downsizing or when mergers or acquisitions take place. Unless the KASH gaps flowing inevitably from organisational change initiatives are bridged efficiently and effectively, whether at the organisational, group or individual level, the organisation will not develop the critical capabilities [and competencies] required to make a successful transition from an [undesired] present state to the new [desired] future state’. (p. 27)

Hamlin (2001a) also argues that the extent to which appropriate HRD effort is incorporated into OCD programmes can critically determine whether a planned change succeeds or fails. Hence, if managers are to be in control of change they need to be ‘learning focused’ and in control of the KASH issues involved in the change process. However, many managers are not learning focused and give insufficient attention to OCD-related KASH issues. Hence, a major challenge confronting professional HRD practitioners is how to persuade or help managers to use HRD as a tool for managing and facilitating change effectively and beneficially.

Historically, various HRD practitioners have performed these change agency roles in strategic partnership with line managers, as illustrated by 18 reflections on practice case histories in Hamlin et al.’s (2001) edited book: Organisational Change and Development: A Reflective Guide for Managers, Trainers and Developers. These case histories were authored by HRD-orientated managers, trainers and developers who, during the 1990s, had brought about or had helped to bring about organisational change at a strategic or operational level in their respective private, public or voluntary/third (not-for-profit) sector organisations. Of the 18 case histories, 16 were based in the UK, one in Ireland and one in the Netherlands. In reflecting upon and writing about the process issues of their OCD change agency practice the authors were asked to identify: (1) what they perceived had been the critical factors that had contributed not only to their success but also to any failure they had experienced and (2) the insights and learned lessons (ILs) which they would like to share with other change agents. Hamlin (2001b) conducted a cross-case comparative analysis of these ILs and found ten of them to be generalised across many of the case histories and thus could be regarded as ‘common insights and learned lessons’ (CILs). Of these CILs, two suggested that being reflective and being research-informed were critical factors in assuring
maximum change agency effectiveness. This prompted him to argue that change agents ‘should emulate the model of evidence-based medicine’ and that ‘evidence-based practice ought to become an essential feature in the process of managing organisational change and development’ (p. 291).

More recently, he again voiced this same argument in Hamlin et al.’s (2019a) two-volume co-edited book Evidence-Based Initiatives for Organisational Change and Development (see Hamlin 2019), and he has also offered a definition of evidence-based organisational change and development (EBOCD) as follows:

‘EBOCD is the conscientious, explicit and judicious use of current best evidence and of action research to inform, shape, critically reflect upon, and iteratively revise decisions made in relation to the formulation and implementation of OCD interventions and the associated change management processes’. (Hamlin 2016, p. 129)

The book is a reprised version of Hamlin et al.’s (2001) predominantly UK-centric book but is much larger in scale and is much more international in scope and range. It contains 53 chapters of which 42 demonstrate the practical reality of EBOCD in the real world of work. Nine of the 42 chapters were authored by 15 well-informed and seasoned OCD practitioners including HRD scholars and practitioners, OD specialists, executive coaches and change management consultants who offered their respective perspective on EBOCD based on their own evidence-based change agency experience in multiple organisational contexts in two Anglo countries (Australia and the UK) and four non-Anglo countries (Brazil, Germany, Italy and Palestine). The other 33 chapters contain reflective case histories of EBOCD initiatives in specific single organisation contexts that were authored by other evidence-based OCD practitioners. These included HRD-orientated organisational leaders/senior executives and functional managers, HRD scholars and practitioners, OD specialists, executive coaches and change management consultants. Of the 33 change initiatives, 18 were carried out within Anglo countries (New Zealand, the UK and the USA) and 15 within non-Anglo countries (Germany, Honduras, India, Italy, Lebanon, Malaysia [though linked to...
Australia], the Netherlands, Portugal, Singapore, Switzerland and the United Arab Emirates (UAE)). Similar to the guidance given to contributors to the Hamlin et al. (2001) book, the authors of the 33 case history chapters were invited to make explicit in their critical reflective stories of evidence-based change agency those ILs they wished to share with other EBOCD practitioners.

The co-editors of the Hamlin et al. (2019a) book conducted a multiple cross-case comparative analysis (MCCCA) of (1) the aforementioned nine perspectives which led to the identification of four important factors that influence effective OCD and (2) the aforementioned 33 case histories which led to the validation of the ten original CILs on EBOCD identified by Hamlin (2001b) plus the identification of ten emergent new CILs. Building upon this past MCCCA study which has direct relevance for all OCD practitioners, and not least for HRD practitioners, this chapter has three specific aims as follows:

a) To elaborate upon the critical importance of an evidence-based practice (EBP) approach to change agency involving the use of best evidence to inform, shape and critically evaluate OCD initiatives;
b) To describe the research process of the previously cited MCCCA study and discuss the findings from the analysis;
c) To express these findings in the form of a conceptual process model for facilitating EBOCD and to discuss how the model can help HRD practitioners and other OCD-related change agents to enhance their change agency practice.

In terms of learning outcomes, it is anticipated that professional HRD practitioners and scholars and other people and organisation developers who read this chapter will acquire:

1. A greater awareness of how they can maximise their contribution to the achievement of organisational effectiveness and sustainable business success by acting as the strategic partners of managers in managing/facilitating OCD initiatives;
2. An appreciation of evidence that suggests that critical reflection is a legitimate and crucial part of effective change agency practice and that it needs to be an explicit part of the change management process;
3. A better understanding of the practical reality rather than the rhetoric of EBP approaches to OCD across countries and continents;
4. An appreciation of recently validated and newly emergent common insights and learned lessons and of several important factors that influence the effectiveness of OCD initiatives for bringing about effective and beneficial change.

5.2 A Compelling Rationale for EBOCD

The fast pace of technological and digital changes, developing and differing expectations of the workforce and shifting demographics in the competitive global context have resulted in the need for organisational leaders and their managers to recognise the uncertain and unpredictable environment in which they operate. Consequently, they need to find ways to successfully navigate through the complexity and ambiguity brought about by ongoing change and seek creative solutions to remain competitive and effective in the VUCA world of volatility, uncertainty, complexity and ambiguity (Bawany 2016; Cummings and Worley 2018). Human resource development and organisation development play a key role ‘in helping organisations to change themselves’ (Cummings and Worley 2018, p. 5). However, contemporary literature suggests that 70% or more of rightsizing, mergers, acquisitions and other organisational change programmes either fail or are just partially successful, and that the workplace challenges posed by OCD initiatives typically have a negative impact on employees (Hamlin et al. 2019a; Shook and Roth 2011; ten Have et al. 2017).

As a result of such failure rates, various scholars (see Hamlin 2001b) have suggested that organisational leaders, line managers and professional HRD practitioners should strive to become more critically reflective and evidence-based in their OCD-related change agency practices to improve the chances of change success. However, Mclean and Kim (2019)
contend that a major obstacle is the continuing lack of relevant management and OCD-related Mode 1 and Mode 2 research that change agents can draw upon to use as *best evidence* for informing, shaping and critically evaluating EBOCD initiatives. In the absence of such high strength forms of *best evidence* generation, there is a need to gather other forms of lower strength *best evidence*. These can include national and international examples of *situated expertise* in OCD-related change agency practice regarding what works and does not work to assist and support leaders, managers and HRD practitioners to make more informed decisions on developing organisational capability and implementing more effective organisational change.

### 5.3 EBOCD Change Agency Practice

This section outlines the critical change agency role of line managers and HRD practitioners in bringing about effective and beneficial OCD and the case for evidence-based change agency practice.

#### 5.3.1 Critical Change Agency Role of Line Managers and HRD Practitioners

The need for managers to initiate and facilitate OC and OD programmes effectively and beneficially in the twenty-first century is increasing in frequency, pace and complexity (Cummings and Worley 2018; Hamlin et al. 2001). In this context, a major challenge facing modern-day managers and professional HRD practitioners is how best to help staff cope effectively within working environments that are in a state of constant flux. Unfortunately, many OCD programmes fail because managers and their HRD colleagues, as well as many external professional change agents (e.g. OD specialists, management consultants and executive coaches) whose services are used in support roles, find themselves unable to rise to the challenge because of a lack of change agency expertise caused by one or more underlying root failings (Hamlin 2001a). Most of these failings are attributed to managers’ lack of knowledge about change agency
practice, the temptations to implement quick fixes, and not fully understanding the importance of leadership, culture and people issues. An additional failure is managers not appreciating the contribution that professional HRD practitioners can make towards the effective facilitation of organisational change processes. However, for those organisations that do facilitate OCD programmes effectively and beneficially, change initiatives become welcomed as opportunities for increasing efficiency and for building new organisational success.

Although it may be widely recognised that most managers in most organisations are to a greater or lesser extent agents of change, this cannot be assumed to be the case for most HRD practitioners. Historically, many have lacked high credibility in the eyes of managers. For some, this has not been helped by being part of HR departments which have also lacked status in the eyes of managers due to either: (1) the dominant focus of the HR function on personnel administration or (2) frustration with their experience of HR staff being too rigid, lacking in business acumen and always seeming to say ‘no’ when managers need them to help figure out how to make things work (Hamlin 2001a; Cardillo 2012). Thus, many managers have placed uniformly low role expectations on the HR function (Thornhill et al. 2000; Ulrich 1997) and, by association, also on the HRD function.

Consistent with the conceptualisation and definition of HRD offered by Hamlin and Stewart (2011) and Hamlin (2019) respectively, the role of modern-day HRD practitioners should embrace not only the learning and development field of practice but also the Organisational Development and Design and talent development aspects of the Talent Management fields of practice as defined by the Chartered Institute of Personnel and Development (CIPD) in the UK. As Stewart (2015) claims, HRD practitioners are change agents skilled in advising and helping managers with the facilitation of OCD programmes, either in their capacity as a colleague or as an external consultant. Indeed, Stewart and others have argued that HRD is of itself a strategic function which, when fully utilised, can have a significant impact on the survival and long-term business success of organisations (see Fredericks and Stewart 1996; Stewart and McGoldrick 1996).
The aforementioned views are consistent with Phillips and Shaw’s (1989) advocacy of a consultancy approach for trainers which involves HRD practitioners operating not only as training consultants and learning consultants but also as organisational change consultants. Thus, both in theory and practice the contribution of appropriate HRD consultancy type practices can be a major influence on the interplay of culture, leadership and commitment of employees through shaping organisational culture, developing current and future leaders, building commitment among organisation members and anticipating and managing responses to changing conditions (Gold et al. 2009). These views resonate with Kohut and Roth’s (2015) claim that ‘HRD practitioners and scholars need [increasingly] to enter the fray of the discussion on change management’ (p. 231) and they also align with McKenzie et al.’s (2012) observation that:

*the shift from operational and tactical HRD to strategic HRD has witnessed a metamorphosis for HRD practitioners increasingly becoming strategic partners in the business tasked with aligning people, strategy, and performance rather than simply promoting learning and development*. (p. 354)

### 5.3.2 Case for Evidence-Based Change Agency Practice

It has been argued that for managers and HRD practitioners, including trainers, developers and other people and organisation developers such as OD specialists and executive coaches, to become truly expert they need to use the findings of high-quality management and HRD-related research to inform, shape and evaluate the effectiveness of their change agency practice (Hamlin 2001b). More recently, it has been argued that HRD practitioners should strive to become more critically reflective and truly evidence-based to improve their effectiveness and credibility in the eyes of senior executives and managers (Gubbins et al. 2018; Hamlin 2007; Holton 2004; Kearns 2014). Similarly, Rousseau and Barends (2011) have argued the case for human resource/human resource management (HR/HRM) practitioners in general to become evidence-based,
and Grant (2003) has called for evidence-based approaches to practice in the field (and business) of professional coaching. Similar calls have been made for managers and leaders to advance their professional practice using high-quality research to become evidence based. Additionally, there are many advocates of evidence-based management (EBMgt) (see Axelsson 1998; Brewerton and Millward 2001; Briner et al. 2009; Latham 2009; Pfeffer and Sutton 2006; Rousseau 2006, 2012; Stewart 1998).

The argument that managers and HRD practitioners should be critically reflective and evidence-based in their professional practice is compelling bearing in mind the increasing complexities, contradictions and paradoxes of organisations which make the tasks of facilitating OCD complicated (Hatton 2001; Vince 2014). Therefore, to meet the challenge of implementing complicated change agency tasks caused by the potential complexities, contradictions and paradoxes of change settings, evidence-based managers and evidence-based HRD practitioners (including OD consultants and executive coaches) need increasingly to use best evidence to inform, shape and evaluate their change agency practice. This could include (1) Mode 1 ‘scientific research’ which is concerned with conceptual knowledge production and the testing of theory, (2) Mode 2 ‘applied research’ which is mainly concerned with instrumental knowledge production to solve real-life problems, or (3) best evidence of lesser strength such as descriptive studies, the opinion of respected expert committees or, as previously mentioned, situated expertise based on the proficiency and judgment that individual managers acting as change agents acquire through experience and practice (Morrell 2008; Reay et al. 2009; Rynes and Bartunek 2017; Tourish 2013). McLean and Kim (2019) claim that, regardless of the research paradigm used, it is ‘difficult (if not impossible) to generate knowledge that is likely to be accepted as evidence which can be applied broadly’ (p. 716). They believe that a major limitation to what they refer to as emerging EBOCD is the existing research paradigms associated with publications and that this calls for a shift in mindset on the part of university administrators, journal editors and editorial boards and authors. Furthermore, they argue that replicated research needs to be valued and encouraged because it is through replicability that knowledge becomes acceptable as evidence.

Regardless of the approach or paradigm adopted or the strength of best evidence used to facilitate an OCD programme, planned change agency
activities need to build enough time for review and critical reflection. From such reflection, new theoretical insights can be gained as to why particular aspects of OCD programmes succeed or fail. Additionally, new ways of approaching the problems of change may emerge through the development of lay theories informed by their own professional practice. These are the types of key lessons that resulted from the OCD practitioner reflections on practice reported by Hamlin (2001b) in Hamlin et al. (2001). The practical importance of internal/in-company Mode 2 research, and in particular design science research as defined by van Aken (2005, 2007) and advocated by Hamlin (2007) as well as various other writers (see Kuchinke 2013; Sadler-Smith 2014) for generating instrumental knowledge to better understand the change context and help solve context-specific real-life problems, cannot be overstated.

In summary, if managers and HRD practitioners consciously use good/high-quality Mode 1 and Mode 2 research, whether conducted from the philosophical perspective of a particular research paradigm or the pragmatic approach, or if they use other forms of lower strength best evidence to help inform, shape and evaluate their change agency practice, then it is more likely that their resulting EBOCD interventions will be more effective than conventional OCD initiatives in bringing about beneficial change that leads to the intended desired state rather than to an undesired and unintended state. However, as previously mentioned, the present comparative dearth of OCD-related best evidence derived from Mode 1 research has led some writers to question whether the rhetoric of EBOCD will ever become a practical reality (see McLean and Kim 2019). In this chapter, however, a more positive and optimistic perspective is offered for two main reasons; the first is because of the wide range of extant OCD-related best evidence and other relevant literature that informed the change agency of the authors who contributed the 33 reflective case histories to the Hamlin et al. (2019a) book, and the second reason is because of the body of best evidence that resulted from the previously cited multiple cross-case comparative analysis (MCCCCA) of those 33 case histories and of the nine contributed OCD practitioner perspectives. In the following section the research process and results of the previously discussed MCCCCA study of EBOCD initiatives that was conducted by the authors of this chapter and first reported in Hamlin et al. (2019b) are discussed.
5.4 Empirical MCCCA Study of EBOCD Initiatives

5.4.1 Purpose of the Study and Research Questions

As previously mentioned, the purpose of the MCCCA study was to glean common insights and learned lessons from the candid and authentic voices of OCD practitioners who had used bodies of best evidence and/or had instigated research to help enhance their change agency capabilities. Four specific research questions were addressed as follows:

- **RQ1**: What insights and learned lessons about EBOCD can be deduced from the qualitative content analysis of critically reflective case histories of specific evidence-based (or not) OCD initiatives within 33 single organisation settings situated in four Anglo and 11 non-Anglo countries across five continents?
- **RQ2**: To what extent do the ILs identified by research question 1 (RQ1) lend support to ten CILs derived originally by Hamlin (2001b) from 16 UK-based and 2 non-UK-based critically reflective case histories published in Hamlin et al. (2001).
- **RQ3**: Can other new CILs be identified by subjecting to thematic analysis the ILs identified by RQ1 that are not convergent in meaning with any of the ten original CILs?
- **RQ4**: What insights about effective OCD and EBOCD practice can be identified by a qualitative content analysis of the perspectives on EBOCD initiatives carried out by 15 well-informed and seasoned OCD practitioners from two Anglo and four non-Anglo countries in multiple organisational settings?

5.4.2 Academic and Methodological Considerations

The philosophical stance adopted was based on the pragmatic approach (Morgan 2007) which allows researchers to deploy a research methodology and methods best suited for addressing the research questions rather than being constrained by what is privileged by a selected research paradigm.
The entire contents of the 33 reflective case histories (stories) of specific OCD initiatives in single organisation contexts were initially subjected to qualitative theoretical analysis using open coding at the first level of analytic abstraction to disentangle the data line-by-line and sentence-by-sentence, and thereby identify segments (keywords, phrases and sentences) that could be expressed in the form of concepts (units of meaning) to which codes could be attached (Flick 2014). The aim was to search for commonalities and relative generalisations across the case histories and assess the extent to which the findings provided support for the ten original CILs identified by Hamlin (2001b) (see Table 5.1).

The ILs that could not be mapped were subsequently subjected to inductive axial coding to differentiate and group them into categories and thereby identify (if possible) a set of emergent new CILs about effective OCD initiatives and evidence-based change agency. This process involved searching for evidence of sameness, similarity or an element of congruence between the codes. Sameness was deemed to exist when the codes of two or more units of meaning were identical or near identical. Similarity was deemed to exist when the sentences and/or phrases of the coded concepts were different but the kind of meaning was the same.

Table 5.1 ‘Original’ CILs deduced by Hamlin (2001b)

|   |                                                                                         |
|---|-----------------------------------------------------------------------------------------|
| 1 | Communicating with all stakeholders for the purpose of securing common ownership, commitment and involvement |
| 2 | Securing the active commitment, involvement and participation of senior to middle managers is pivotal |
| 3 | Securing top management support                                                          |
| 4 | Being clear, consistent and open with regard to what you are seeking to achieve, setting clear strategic objectives and sharing the vision |
| 5 | Recognising and addressing the real problems or root causes of change agency problems, including the cultural dimensions |
| 6 | Giving enough time for the OCD programme to take root and succeed                       |
| 7 | Recognising the relevant contributions that the HR function can make and the strategic role it can play in bringing about transformational change |
| 8 | The role of learning in the change management process and the need for a no-blame culture |
| 9 | The importance of being reflective as a change agent                                     |
| 10| The value of conducting internal research as part of the change agency practice           |
Congruence existed where there was an element of sameness or similarity between the compared coded concepts.

To address RQ4, the contents of the selected perspectives on EBOCD initiatives presented in the nine chapters constituting Section 2 of Hamlin et al.’s (2019a) book were subjected to thematic analysis. The aim was to scrutinise what the respective OCD practitioner authors had claimed to be the important factors influencing effective organisational change and to identify those factors that were common across some or all nine perspectives.

5.4.3 Findings and Discussion

Of the ten original CILs, seven were strongly validated by over 50% (18 to 27) and a further two by over 40% (13 and 16) of the ILs abstracted from the 33 reflective case histories. Only one of the original CILs was weakly validated with just over 18% \( (n = 6) \) of the case histories. The coding of the remaining ILs led to the emergence of ten new CILs. The thematic analysis of the reflective perspectives on EBOCD initiatives offered by seasoned OCD practitioners operating in a wide range of Anglo and non-Anglo countries resulted in a synthesis of their insights and key learning. This synthesis suggests there are four important factors that influence effective OCD initiatives, namely context, leadership, communication and collaboration.

5.4.4 Specific Results of Addressing RQ1–RQ3

The results of comparing the reflective case histories are shown in the form of a grid (see Table 5.2). For each case history the ‘x’ in a grid box indicates those original CILs that are supported and thus validated by one or more ILs identified within the main text and/or the concluding reflections section of that respective case history.

Overall, the authors of 27 of the 33 (81.82%) case histories identified aspects of Communicating with all stakeholders for the purpose of securing common ownership, commitment and involvement [in the change facilitation process] as a key insight/lesson regarding effective OCD and
Table 5.2 Result of MCCC of the reflective case histories

| Case histories (CHs) | Original common 'insights' and 'learned lessons' (CILs) (Hamlin 2001a) | Number and types of OCD-related best evidence references cited in the CHs |
|----------------------|------------------------------------------------------------------------|------------------------------------------------------------------------|
|                      | Type of business | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | a | b | c | d |
| **NZ and UK**        |                |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| Trade Union          |                |   |   |   |   |   |   |   |   |   |   | 4 | 1 | 3 |   |
| Council              |                |   |   |   |   |   |   |   |   |   |   | 3 | 1 |   |   |
| Healthcare           |                |   |   |   |   |   |   |   |   |   |   | 1 | 1 | 5 | 2 |
| Manufacturing        |                |   |   |   |   |   |   |   |   |   |   | 9 | 1 | 5 | 2 |
| Not-for-profit       |                |   |   |   |   |   |   |   |   |   |   | 3 |   |   |   |
| Manufacturing        |                |   |   |   |   |   |   |   |   |   |   | 3 | 1 | 2 |   |
| Healthcare           |                |   |   |   |   |   |   |   |   |   |   | 4 | 9 | 3 |   |
| Aerospace            |                |   |   |   |   |   |   |   |   |   |   | 7 | 1 | 12|   |
| Not-for-profit       |                |   |   |   |   |   |   |   |   |   |   | 2 | 6 | 1 |   |
| Policing             |                |   |   |   |   |   |   |   |   |   |   | 5 | 1 | 4 |   |
| **USA**              |                |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| Entertainment        |                |   |   |   |   |   |   |   |   |   |   | 4 |   |   |   |
| Beverage             |                |   |   |   |   |   |   |   |   |   |   | 6 | 2 | 3 |   |
| Professional services|                |   |   |   |   |   |   |   |   |   |   | 5 | 1 | 1 |   |
| Healthcare           |                |   |   |   |   |   |   |   |   |   |   | 2 | 3 | 6 |   |
| Laboratories         |                |   |   |   |   |   |   |   |   |   |   | 3 | 3 |   |   |
| Healthcare           |                |   |   |   |   |   |   |   |   |   |   | 2 | 4 | 1 |   |
| Healthcare           |                |   |   |   |   |   |   |   |   |   |   | 14| 9 | 24| 2 |
| Education            |                |   |   |   |   |   |   |   |   |   |   | 1 | 2 |   |   |
| **Non-Anglo**        |                |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| Carpentry            |                |   |   |   |   |   |   |   |   |   |   | 6 | 1 |   |   |
| Healthcare           |                |   |   |   |   |   |   |   |   |   |   | 2 | 1 | 3 |   |
| Gas                  |                |   |   |   |   |   |   |   |   |   |   | 2 | 1 | 1 |   |
| Banking              |                |   |   |   |   |   |   |   |   |   |   | 5 | 6 |   |   |
| Shipping/transport   |                |   |   |   |   |   |   |   |   |   |   | 5 |   |   |   |
| Automotive           |                |   |   |   |   |   |   |   |   |   |   | 4 | 2 | 3 | 1 |
| Healthcare           |                |   |   |   |   |   |   |   |   |   |   | 5 | 3 | 2 |   |
| Healthcare           |                |   |   |   |   |   |   |   |   |   |   | 4 | 2 |   |   |
| Education            |                |   |   |   |   |   |   |   |   |   |   | 2 | 2 |   |   |
| Various              |                |   |   |   |   |   |   |   |   |   |   | 4 | 3 | 5 |   |
| Manufacturing        |                |   |   |   |   |   |   |   |   |   |   | 1 | 1 | 2 | 1 |
| Banking              |                |   |   |   |   |   |   |   |   |   |   | 2 | 4 | 3 |   |
| Banking              |                |   |   |   |   |   |   |   |   |   |   | 1 | 1 |   |   |
| Healthcare           |                |   |   |   |   |   |   |   |   |   |   | 1 | 4 | 2 | 3 |
| Food                 |                |   |   |   |   |   |   |   |   |   |   | 1 | 1 | 2 |   |
| No. of CHs           |                | 27| 24| 16| 18| 13| 21| 6 | 18| 22| 24|   |   |   |   |
| No. of Refs          |                | 116| 69| 84| 35|   |   |   |   |   |   |   |   |   |   |   |

Source: Adapted from Hamlin et al. (2019a)
EBOCD change agency practice. The next two most supported original CILs were *Securing the active commitment, involvement and participation of senior to middle managers* and *The value of conducting internal research as part of the change agency practice*, with the authors of 72.73% \((n = 24)\) of the case histories having identified in the main text and concluding reflections section of their respective stories various aspects of these two respective coding categories. Five of the other original CILs were supported by more than (or just less than) 50% of the case histories, namely *The importance of being reflective as a change agent* (22 of 33); *Giving enough time for the OCD programme to take root and succeed* (21 of 33); *Being clear, consistent and open with regard to what you are seeking to achieve, setting clear strategic objectives and sharing the vision* (18 of 33); *The role of learning in the change management process and the need for a no-blame culture* (18 of 33); and *Securing top management support* (16 of 33). It is noticeable that *Recognising and addressing the real problems or root causes of change agency problems, including the cultural dimension* was supported by evidence from only 39.39% \((n = 13)\) of the case histories. The reason for this may be due to the fact that most of the OCD practitioner authors of the case histories had either acted in the role of internal change agents and may have already identified the real problems and root causes for the change, or they had been external consultants who had been working with the change managers in collaborative partnership from the time the OCD initiative had been first triggered by a problem where its root cause was not in question. However, this chapter suggests this original CIL, which is relevant to all external management consultants at the contracting phase of a new consultant-client relationship, should not be thought of as anything less crucial than any of the more supported CILs. Surprisingly, the CIL *Recognising the relevant contributions that the HR function can make and the strategic role it can play in bringing about transformational change* was supported by just 18.18% \((n = 6)\) of the case histories. This limited amount of supporting evidence might be reflecting the negative view that many line managers have of the HR function and of HR professionals in general as previously discussed. The axial coding of the ILs that could not be mapped against the ten original CILs led to the emergence of ten new CILs as listed in Table 5.3.
The columns to the right-hand side of Table 5.2, which show the number and types of OCD-related *best evidence* references cited in the reflective case history chapters, indicate the extent and range of literature that these EBOCD practitioners had drawn upon to inform, shape and critically evaluate their OCD initiatives and change agency practices. Across the 33 case histories, a total of 501 published works had been cited of which 304 are directly related to OCD issues. Of these, 116 (38.16%) are OCD and change management related books/handbooks or magazines including the Harvard Business Review (HBR); 69 (22.70%) are books and journal articles on OCD-related theories and models; 84 (27.63%) are journal articles reporting OCD-related generalised Mode 1 and context-general Mode 2 empirical research findings and 35 (11.51%) are journal articles or other publications reporting the results of context-specific (i.e. organisation-specific or sector-specific) OCD-related Mode 2 research or management investigations focused on hard fact data gathering to inform managerial decision-making. Thus, the implications are that there is already an existing and sizable body of *best evidence* of variable strengths currently available for OCD practitioners to draw upon if so inclined to become more research-informed and evidence-based.

Table 5.3  Emergent ‘new’ CILs deduced by the MCCCA study of 33 ‘reflective case histories’

|   |                                                                                   |
|---|-----------------------------------------------------------------------------------|
| 1 | Create a vision and set of values that engage everyone                             |
| 2 | Allow participative ‘bottom-up’ initiatives in the change process                 |
| 3 | Adopt a shared/distributive leadership approach                                   |
| 4 | Engage participants affected by the change by giving them voice, using their expertise, involving them and treating them as active collaborative partners |
| 5 | Recognise the power of trust and build on it                                       |
| 6 | Use theory and models as change agency tools and draw upon sources of ‘best evidence’ to inform and guide OCD processes |
| 7 | Ensure understanding of individuals’ interests and the power relationship between those involved in the change and also respect their perspectives |
| 8 | Ensure collaboration between external (or internal) change consultants and the internal client change agents |
| 9 | Ensure all change agents involved in the OCD processes become fully skilled and act as a team |
| 10| Ensure the ‘soft’ social/interpersonal relations/cultural aspects of OCD are given as much attention as the ‘hard’ strategy, structure and systems aspects |
5.4.5 Specific Results of Addressing RQ4

The variety of critical reflective perspectives on EBOCD practice constituting Section 2 of the Hamlin et al. (2019a) book were contributed by authors who are academics writing and researching about OCD, some of whom have been engaged in collaborative academic and industry partnerships to facilitate EBOCD initiatives; internal or external OCD-related consultants; and others who have amassed both insider and outsider knowledge of EBOCD through their various roles. Many of these authors presented perspectives on EBOCD initiatives within diverse organisational sectors. The change interventions ranged from training and coaching programmes to quality management, culture change, strategic direction, data-driven decision-making, acquisitions and applied theatre. Moreover, these contributions comprised an array of perspectives on EBP change agency in a wide range of Anglo and non-Anglo countries as previously indicated earlier in this chapter.

A synthesis of these contributions suggested that there are four important factors that influence effective OC which so happens to be consistent with existing literature. These factors include context, leadership, communication and collaboration. Furthermore, a review of the critical reflections upon EBOCD practice offered by these authors suggest that they had demonstrated their commitment to EBP through (1) the use of academic literature to inform their practice; (2) the use of models, frameworks and theories to underpin their practice; (3) the deployment of action research or instigation of research to generate new empirical evidence to inform their practice; and (4) critical reflection and introspection to enhance their practice.

- Context: The importance of understanding and being attuned to context was a theme that was consistent across these contributions. The majority of authors mentioned environmental and organisational contexts and increasing internal and external workplace pressures that impact change. The changing business environment was characterised as being volatile, uncertain, complex and ambiguous and how this effected ‘C-suite’ behaviours and expectations was mentioned along
with the changing market conditions and the need to evaluate the context, to align strategy within the context, to invest in learning and development particularly within higher levels of which will then lead to increased individual and organisational readiness to change, to have internal change agents who are attuned to the organisational context and culture and to ensure that attention is paid to the organisational history.

- **Leadership:** The importance of leadership resonated throughout these contributions in terms of leaders being committed and supportive of change endeavours, taking ownership and responsibility for the desired change, along with the point that leaders need to be competent change agents and that such competence may need to be developed. Some authors stated that leadership is about influencing others to make better decisions but they acknowledged that all leaders can and do sometimes make poor decisions. Other authors critically reflected upon the adverse consequences of leaders making hasty decisions. Top leadership qualities included being honest, competent, inspiring and forward-looking. It was suggested that change practitioners should also be ready and able to lead from the front and to demonstrate these essential qualities. Additionally, the leadership merry-go-round whereby constant changes at the top disrupt reactions and the flow of change over time was discussed with the links between leadership behaviour, specifically coaching skills and organisational culture, and employee engagement and performance.

- **Communication:** It was acknowledged that the more successful change programmes are those where a communication approach is used that ensures value alignment among those implementing the change, those impacted by the change process and the type of change process that is being implemented. Organisational culture and the values within it were recognised as driving the organisational mantra and the importance of an open and communicative organisational culture was acknowledged. Similarly, the importance of intense and opportune communication, the need for communications to be open and transparent and that successful change needs communication and involvement at all levels were also made clear. The authors asserted that
having a better understanding of the organisational culture and the values system within it will help the organisation to (1) better address resistance to change which is a phenomenon that is a shared responsibility among change agents and change recipients and (2) more effectively communicate, implement and embed change.

• **Collaboration:** The importance of involving organisational members, promoting participation and enabling collaboration was also a consistent theme across these contributions. Creating a climate of sharing and knowledge brokering to help improve and embed leadership decision-making, agreeing a ‘route map’ from the top level and insisting that the change messages need to come from one team only and using quality management could be a way to bring together other systems and processes into one core quality system approach. Finally, using applied theatre as an intervention can support individuals, managers and leaders within organisations to collectively navigate change through creating a safe place to work and to share emotions, feelings and reflections with others. This intervention relies heavily on participation and engagement and the creation of a safe space to enable participants to understand their emotional responses to change which may influence the ability to respond more effectively to it.

These four important factors (context, leadership, communication and collaboration) are often considered to be factors that can enable effective organisational change but, paradoxically, they can hinder organisational change. Moreover, the contributing authors also acknowledged how they embraced EBP in their OCD endeavours. Specifically, the use of existing OCD literature to inform practice was consistent across their contributions, as was the use of models, frameworks and theories along with data collection through 360-degree feedback, and the use of previously validated survey instruments and assessments along with action research approaches. Lastly, the importance of being a reflective OCD practitioner who engages in critical reflection and introspection was especially reiterated.
5.5 Conceptual Process Model for Facilitating EBOCD

As will be appreciated, the significance of the aforementioned four important factors has been well illustrated in many of the 33 reflective case histories. To summarise and integrate the CILs resulting from the MCCCA study discussed above, a conceptual process model for facilitating EBOCD has been created and offered as presented in Fig. 5.1. To avoid duplication, the CILs most associated with leadership, communication and collaboration have been placed in the model as OCD antecedents given the criticality of leadership, communication and collaboration to change agency practice.

The other CILS have been placed in the model as enabling and inhibiting factors that moderate the change process. Lastly, inclusion in the model of the organisational context which reflects both internal and external environmental factors reminds us of the situated nature of change agency practice. Table 5.4 has been developed to illustrate how the best evidence inputs, the CILs and the four important factors have been positioned in the model.

The offered conceptual process model in Fig. 5.1 clearly shows the Mode 1 and Mode 2 research inputs (antecedents) as best evidence to inform, shape and evaluate the formulation and execution of EBOCD strategies and plans throughout the change process. The model shows that EBOCD initiatives are subject to several moderating factors that can enable or inhibit progress before the desired outcome is reached. Ideally, the outcomes of effective OCD initiatives are beneficial to both the organisation, the teams and the individuals, but also feed into the creation of new Mode 2 instrumental knowledge and a larger body of best evidence that can be used for future change initiatives moving forward. In short, this model depicts the key learning from (1) all the insights and learned lessons resulting from the cross-case analysis of previous and current critical reflective case histories and (2) the four important factors deduced from the perspectives of well experienced/seasoned OCD practitioners.
Fig. 5.1 Conceptual process model for facilitating evidence-based OCD
Table 5.4 Positioning of the ‘original’ and emergent ‘new’ CILs and the ‘four important factors’ within the offered conceptual process model for facilitating EBOCD initiatives

| 'Original' common insights and learned lessons (CILs) | Positioning within the conceptual process model | Emergent ‘new’ common insights and learned lessons (CILs) | Positioning within the conceptual process model |
|-----------------------------------------------------|-----------------------------------------------|----------------------------------------------------------|-----------------------------------------------|
| 1 Communicating with all stakeholders for the purpose of securing common ownership, commitment and involvement | OCD antecedents—communication | Create a vision and set of values that engage everyone | Moderating factors |
| 2 Securing the active commitment, involvement and participation of senior to middle managers is pivotal | OCD antecedents—leadership | Allow participative ‘bottom-up’ initiatives in the change process | Moderating factors |
| 3 Securing top management support | OCD antecedents—leadership | Adopt a shared/distributive leadership approach | OCD antecedents—leadership |
| 4 Being clear, consistent and open with regard to what you are seeking to achieve, setting clear strategic objectives and sharing the vision | Moderating factors | Engage participants affected by the change by giving them voice, using their expertise, involving them and treating them as active collaborative partners | Moderating factors |
| 5 Recognising and addressing the real problems or root causes of change agency problems, including the cultural dimensions | Context—external and internal factors | Recognise the power of trust and build on it | Moderating factors |
Table 5.4 (continued)

| Original’ common insights and learned lessons (CILs) | Positioning within the conceptual process model | Emergent ‘new’ common insights and learned lessons (CILs) | Positioning within the conceptual process model |
|----------------------------------------------------|--------------------------------------------------|--------------------------------------------------------|--------------------------------------------------|
| 6 Giving enough time for the OCD programme to take root and succeed | Moderating factors | Use theory and models as change agency tools and draw upon sources of ‘best evidence’ to inform and guide OCD processes | Best evidence inputs |
| 7 Recognising the relevant contributions that the HR function can make and the strategic role it can play in bringing about transformational change | Moderating factors | Ensure understanding of individuals’ interests and the power relationship between those involved in the change and also respect their perspectives | Moderating factors |
| 8 The role of learning in the change management process and the need for a no-blame culture | Moderating factors | Ensure collaboration between external (or internal) change consultants and the internal client change agents | Moderating factors |
| 9 The importance of being reflective as a change agent | Moderating factors | Ensure all change agents involved in the OCD processes become fully skilled and act as a team | Moderating factors |
| 10 The value of conducting internal research as part of the change agency practice | Best evidence inputs | Ensure the ‘soft’ social/interpersonal relations/cultural aspects of OCD are given as much attention as the ‘hard’ strategy, structure and systems aspects | Moderating factors |
5.6 Implications for HRD and OCD Practice

The purpose of this final section is (1) to outline for HRD practitioners and other OCD-related change agents who support organisational leaders and line managers engaged in managing change how the findings from the MCCCA study depicted in our offered conceptual process model can be translated into actionable strategies that seek to enhance their evidence-based change agency practice and (2) to consider the implications if managers within their organisations or host organisations are unable to rise to the challenge of change because of the OCD failings discussed earlier in this chapter.

5.6.1 Implications of the Importance of Evidence-Based Initiatives for OCD

Recognising that the 33 reflective case histories were indicative of the reality of EBOCD in the world of practice, the findings help to demonstrate that EBP in the field of OCD is not merely rhetoric emanating from the world of academe but key to change success. However, as stated earlier, the overall body of extant OCD-related best evidence is small compared to other areas of management/leadership study and practice. Hence, there is a need for far more conventional Mode 1 research that is designed to (1) gain a better relational understanding of those generic factors found within many if not most organisations which have the potential to either help or hinder OCD processes and (2) to generate (if possible) generalisable conceptual knowledge that has relevance and utility across multiple organisational settings. Additionally, as Hamlin (2015) has argued, there is a need for other paradigmatic approaches such as those based on pragmatism and mixed-method research. These include notions of Mode 2 research for generating context-specific instrumental knowledge for direct application, and of Mode 2 replication research studies that explore OCD-related issues, which are common to many organisations, with the aim of developing mid-range theory from practice through replication logic and multiple cross-case comparative analysis (Eisenhardt 1989; Tsang and Kwan 1999).
However, this chapter suggests that more best evidence derived from the situated expertise of other EBOCD practitioners, not least HRD practitioners who act as organisational change agents, is now required to validate the emergent new CILs and to further develop the deduced conceptual process model. If more EBOCD-related scholars and practitioners became more active in instigating and conducting design science research and other Mode 2 studies, and these were to be focused on OCD-related field problems and/or other issues of common concern or interest to managers in multiple organisations, the implication is that such studies could lead to a significant bridging or closing of the reputed research-practice gap in the field of OCD. To this end, HRD practitioners, with the support of HRD scholars, have an additional important role to play in identifying the organisational behaviour and associated KASH related field problems that need to be better understood through instigated academically rigorous Mode 2 research.

5.6.2 Implications If Managers Suffer from the Root Failings That Cause OCD Initiatives to Fail

Whatever level of evidence-based change agency expertise that HRD practitioners can acquire, such expertise will be put to little use unless and until line managers overcome the root OCD failings that cause change initiatives to fail. Herein lies a major challenge for HRD scholars who teach on management/leadership-related Masters level professional qualification programmes, such as the Master of Business Administration (MBA), and for HRD practitioners who deliver management and leadership development (MLD) programmes. It is suggested that HRD scholars could and should be ensuring that managers who graduate from such professional qualification programmes fully understand the importance and merits of being evidence-based and of the need to embed HRD into the fabric of their management and change agency practice so that appropriate attention and effort is given to the KASH issues and the role of learning (and unlearning) in the change management process. Furthermore, HRD scholars and HRD practitioners, including executive coaches involved in delivering MLD-related education or training
programmes for organisational leaders, senior executives and other top managers, could and should help them to (1) become more cognisant of the soft issues of management that should be considered when formulating OCD strategies, (2) give their line managers who implement their OCD strategies sufficient time to attend to the soft human aspects of the change management process and (3) increasingly recognise the value of evidence-based initiatives for OCD.

5.7 Conclusion

In terms of learning outcomes, at the start of this chapter it was anticipated that professional HRD practitioners and scholars and other people and organisation developers would acquire the following: (1) a greater awareness of how they can maximise their contribution to the achievement of organisational effectiveness and sustainable business success by acting as the strategic partners of managers in managing/facilitating OCD initiatives; (2) an appreciation of evidence that suggests that critical reflection is a legitimate and crucial part of effective change agency practice; (3) a better understanding of the practical reality rather than the rhetoric of EBP approaches; and (4) an appreciation of recently validated and newly emergent common insights and learned lessons and of several important factors that influence the effectiveness of OCD initiatives for bringing about effective and beneficial change.

It is hoped that the aforementioned conceptual process model for facilitating OCD, which depicts the ten validated original CILs and ten emergent new CILs resulting from the MCCCA study, together with the four important factors influencing the effectiveness of OCD processes that were derived from the perspectives of seasoned OCD practitioner, serves to address these learning outcomes. As such, the model will have relevance and utility for readers who are striving to become more effective in their OCD change agency practice. Recognising that current thinking suggests that change models do not fully explore or display the multiple approaches to change (Burnes 2014) and that one size does not fit all (Jones et al. 2019), it is anticipated at the very least that this model could serve as a useful guide in the following manner. First, it could be used to
help illustrate the action strategies that can be undertaken by those tasked with change agency responsibilities to ensure that available *best evidence* in the form of Mode 1 and Mode 2 research can be used as critical inputs. Second, it could be used to check the enactment of the validated original CILs and emergent new CILs that are shown as antecedents and moderating factors impacting on the formulation and execution of planned OCD strategies, processes and outcomes. Thirdly, it could remind, as well as influence, OCD practitioners to perpetuate the cycle of using *best evidence* to inform and shape OCD strategies through which new *best evidence* might be generated as part of the change agency process.

In conclusion, it is anticipated that the substantive content of this chapter, as reflected in the conceptual process model that is offered, will provide relevant and useful insights for organisational leaders, managers, professional HRD practitioners and other people and organisation developers on leading, managing and/or facilitating into the future more effective OCD initiatives in their own organisations and/or in host organisations. Furthermore, in line with the aims and scope of this book, it is hoped that this chapter has captured the current and future role and critical contribution of HRD theory and practice, albeit within the context of evidence-based organisational change and development. As a field, HRD academic scholars and professional practitioners have always been concerned with developing and enhancing learning, performance improvement and change interventions that enable organisational leaders, managers and the people within organisations to flourish and optimise organisational functioning. In particular, it has demonstrated empirically how critical reflection and learning at the individual, group and organisational levels are crucial elements of effective OCD change agency practice. As such, it is suggested that this illustrates how various aspects of HRD embedded in the everyday practices and strategies of leaders, managers and professional HRD practitioners can help to bring about effective and beneficial evidence-based organisational change that can inform the creation of future dynamic workplaces and development of future organisational capability. As will be appreciated, the main thrust of logical argument in this chapter has focused on recognising the critical importance of evidence-based practice (EBP) in the field of OCD. In the midst of the unprecedented changes that are currently being experienced...
around the globe given the coronavirus disease of 2019 (Covid-19) pandemic, people are witnessing first-hand the importance of evidence-based practices that are informing and transforming our everyday personal and professional lives, our organisations, our communities and our world. It is imperative now, and in the foreseeable future, that leaders, managers and organisational members are well equipped with the knowledge, skills and capabilities to respond to, adapt to and even anticipate changes triggered by internal and external occurrences. Therefore, in addition to reaffirming the importance of evidence-based OCD change agency practice, the authors of this chapter suggest that there is an equally compelling need to recognise the critical contribution that evidence-based or research-informed approaches in all other areas of the HRD domain of professional practice can make. It is believed that such approaches will enable HRD to become even more relevant, viable and vibrant in the future.

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