**Gordon Institute of Business Science**
University of Pretoria

Learning to lead through opening up: A business school bridging divides through a transformative youth programme

By

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An article submitted to the Gordon Institute of Business Science, University of Pretoria in preliminary fulfilment of the requirement for the degree

**MASTERS OF BUSINESS ADMINISTRATION**

**1 December 2020**

**Declaration**

*I declare that this research project is my own work. It is submitted in partial fulfilment of the requirements for the degree of Master of Business Administration at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.*

Signed: _____

Jadey Bosman

1 December 2020

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## COVER LETTER

Jeannie M. Fourie and Kathy Lund Dean

Co-editors in Chief

Journal of Management Education

1 December 2020

Dear Jeanie M. Forray and Kathy Lund Dean

We wish to submit the attached manuscript, an original research article entitled "Learning to lead through opening up: A business school bridging divides through a transformative youth program" for consideration by The Journal of Management Education (JME). The corresponding author of this manuscript is Ms. Jadey Bosman and the second author is Dr Vivienne Spooner, both representing The Gordon Institute of Business Science.

This qualitative case study explored a nonformal youth leadership development program offered by a South African business school which has been identified as a transformative learning experience that ignites critical reflection and dialogue. Evidence of learning is discussed where respondents reported change in mindset and an openness to accept the limitations of their own worldviews facilitated by seeing the "other" world. It serves as a catalyst for individual transformation and change, which challenges frames of unconscious separation and misinterpretations that many young people have, which reflect the outcomes of the transformative learning pedagogy. This article brings to light an intervention developed as a commitment and catalyst for social justice and inclusion that takes place in the context of a country, marked by great inequality, deep divisions and misunderstanding amongst previously separated groups.

We believe that this manuscript is appropriate for publication by JME as it speaks to the primary focus of enhancing learning in the field of management education with a focus on social issues and diversity management in business. It serves as an Instructional Change in Context article where we describe and analyze a curricular change initiative within a specific cultural context with the aim of benefitting readers who may be in a similar situation

This article is an original manuscript that has not been published elsewhere and is not under consideration for publication elsewhere. We have no conflicts of interest to disclose.

Thank you for your consideration of this manuscript. We look forward to hearing from you in due course.


Sincerely,

Jadey Bosman

MBA Candidate

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**Journal of Management Education**

The Journal of Management Education was rated a 2* by the Academic Journal Guide in 2019 and is Scopus indexed. It is confirmed that the article follows the manuscript submission guidelines.

# 1. LITERATURE REVIEW

## 1.1. Introduction

Spirit of Youth (SoY) is a nonformal youth leadership development programme offered by a leading business school in South Africa that invites a diverse group of school learners to critically engage on contextual issues in South Africa in order to develop their sense of agency and define and co-create the vision for a more equal and just society. The process and outcomes shared by the research participants mirror the learning pedagogy of transformative learning theory which was the lens used to explore the nature of the learning experienced by past participants. This section presents the literature reviewed that formed the foundation of the study and the study objectives. It firstly hones into transformative learning theory, its evolution, its process and outcomes as it related to the study findings. The study then sought to understand how the SoY programme influenced the participants understanding of leadership and therefore this chapter positions the study in pertinent leadership literature that emerged from the study findings. A few key models of leadership were reviewed that reflected the leadership characteristics of past participants are discussed. This chapter presents contextual leadership, responsible leadership and inclusive leadership which were key leadership outcomes of the study.

## 1.2. Transformative Learning Theory

This section reviews transformative learning theory and examines SoY through the lens of this theory. The process and outcomes of a transformative learning process are discussed in relation to the study objectives.

### 1.2.1. Background, Premise and Context

Jack Mezirow's (1990) transformative learning theory has progressed from a stream of scholarly work from authors such as Freire's (1970) conscientisation and critical consciousness theory, and Habermas's (1981) theory of communicative action, amongst others (Mezirow, 1990). It states that through a process of active learning, reflection and placing oneself in situations of discomfort that students develop a better understanding of self which allows for the potential to change ones frame of mind and perspective (Strange & Gibson, 2017). This phenomenon has largely been studied in the field of adult learning and is a positive and growth-oriented theory that facilitates a process of personal transformation (Mezirow, 2000).

The premise of transformative learning is that individuals, particularly adults, have acquired and developed extensive experiences in their lives which contributes to their meaning-making, and that the transformative learning process facilitates modification to the individual's perspective or frame of reference (Benson, Palin, Cooney, & Farrell, 2007). Over years of development and social and cultural assimilation, these forms of meaning and frames of reference become solidified to inform a way of thinking, being and informs a perception of the world (Mezirow, 1997, 2000). The accumulated experience would have developed from childhood where an array of factors would contribute to the meaning derived from certain thoughts, feelings and assumptions that influence how individuals respond to situations in their lives and subsequently shapes paradigmatic assumptions (Tello, Swanson, Floyd, & Caldwell, 2015). Mezirow (1997, p. 5) defined transformative learning as "the process of effecting change in a frame of reference".

A number of scholars have critiqued Mezirow's work in that it focused too much on cognitive process and did not may close enough attention to the holistic origin of learning, namely the influence of context (personal and social factors) and culture (Taylor, 2008). Taylor (1997) concluded although critical reflection is crucial for transformative learning to occur, other ways of knowing too needs to be encompassed. There is thus a need to better recognize and account for the influence of context with a range of diversity elements in terms of ethnicity, gender, class and sexual orientation contributing to alternative ways of knowing (Christie, Carey, Robertson, & Grainger, 2015).

Other early criticisms of Mezirow's work was that he hadn't paid much attention to social change, however, evolving conversation on the theory highlights the need to see transformative learning as part of greater societal transformation (Hoggan, 2016). Transformative learning has since been attentive to learning that affects social change, where individual transformation is emphasised as a precondition for substantive change (Hoggan, 2016). Although Mezirow''s theory has extensive focus on individual transformation, it does highlight that through a process of non-coercive dialogue and challenging ones assumptions, that this mental and behavioural shift produces better individuals and thus a better world (Tello et al., 2015). A more recent definition has been offered as "experiencing a deep, structural shift in the basic

premises of thought, feelings and actions. It is a shift of consciousness that dramatically and permanently alters our ways of being in the world" (Hoggan, 2016, p. 71). This was in line with the SoY programme in that the programme is designed to be a deeply challenging but stimulating experience that shifts their perspectives to elicit a new way of knowing and being, and elicits a response to the issues affecting themselves, their organisations and the country.

Transformative learning involves making sense of one's experiences where *meaning perspectives* - a critical term in transformative learning - is developed mainly through social and cultural assimilation over time which influences the frame of mind through which the world is viewed (Kayes, 2002; Mezirow, 1990, 1997). These include beliefs, values and assumptions about one's identity and the role people ought to play in society (Mezirow, 1997). Mezirow (1997) suggested that these meaning perspectives could lead to misrepresentations later in life which may no longer serve or add value in dealing with current world problems. These meaning perspectives however helps people maintain their views and beliefs that provide individuals with a sense of identity stability and community (Mälkki, 2010), a safe zone that is not easy to reconsider. Meaning perspectives about one's identity and role on broader society can however be changed through the process of transformative learning. Transformative learning is hence a process that assists an individual in shifting their meaning perspectives through the acquisition of new frames of the mind that change existing worldviews that could be somewhat distorted due to the subjective nature of how the world is viewed. Meaning perspectives that are obsolete would require a transformative learning experience which according to Mezirow (1997), could impact one's life significantly.

The process of transformative learning would lead to an individual being more inclusive, more critical of meaning acquired from others, more open to integrating perspectives, more capable to change and empowers one to take control as a socially responsible decision-maker (Mezirow, 2000). Social justice cannot be ignored as one of the primary functions of transformative learning, however Hoggan (2016b) argued that deep, structural social change is only possible through reflective individual learning, where transformative learning provides a basis to do that. In the African context, transformative learning becomes crucial for social change, which is characterised by limiting and estranging knowledge systems, influencing an

individual's meaning-making significantly (Ntseane, 2011). Ntseane (2011) further argued that Mezirow's theory has the potential to add even greater value if applied in a culturally sensitive way, privileging African as opposed to Western ways of knowing. In a few earlier studies that explored transformative learning in nonformal learning context through Afrocentric perspectives, scholars have emphasized the appreciation of context including personal and cultural factors that influence and foster transformative learning (Cox & John, 2016). SoY takes place in Johannesburg, South Africa, a post-apartheid context marked by great inequality, deep divisions and misunderstanding between different social groups in terms of race and class. This context was therefore a crucial consideration in this study since worldviews and perspectives are still largely influenced by a legacy of division and lack of integration of different socio-economic realities due to geographic and other cognitive barriers that continue to exist.

From a business leadership and management perspective, it was argued that transformative learning could in fact be an opportunity to develop leaders to have a deeper understanding and apply knowledge to create personal and organisational excellence while honouring ones duty to societal wellbeing through an openness to become lifelong learners (Caldwell, Floyd, Diane, & Gabriella, 2013). It has been posited that organisational leaders have a duty to reconsider previously held frames of reference, assumptions to modify his or her mental models and challenge conventional wisdom, while at the same time navigating moral and ethical decision-making that impact society (Caldwell et al., 2013). Furthermore, it has been argued that by having the ability to change ones frame of reference, that one is able to develop professional competencies such as systematic problem solving, planning and organising, communication, collaborative teamwork and a greater global understanding (Strange & Gibson, 2017). Transformative learning therefore develops individuals to be much more self-reflective and inclusive through continuous learning patterns that provides one with empowerment and a sense of community. (Mezirow, 1997; Mezirow & Taylor, 2009).

### 1.2.2. The process of transformative learning

For transformation to happen, three core elements have emerged to summarise the iterative and non-linear process, namely: "disorienting dilemma", "critical reflection" and "rational dialogue", from which a new meaning perspective will develop (Hoggan,

2016a). Mezirow's (1997) posited that a combination of these three core elements would lead to transformative learning amongst individuals, however, the process is likely to differ on an individual case by case basis (Taylor, 2008).

### 1.2.2.1. Disorienting dilemma

A disorienting dilemma has been described as an experience that challenges one's mental model in understanding self and the world and is the catalyst to the learning process (Hoggan, 2016b; Taylor, 2008). This occurs through a range of experiences or events that ultimately disrupts one's meaning perspective, and pushes one into a process of introspection and change (Hoggan, 2016). It has also been referred to as a significant break in continuity in one's life, so impactful that it cannot be ignored (Hoggan, Malkki, & Finnegan, 2017). According to Christie, Carey, Robertson and Grainger (2015) this could happen through a major event or learning programme undertaken by individuals.

In this case, the SoY programme could be regarded as a disorienting dilemma where the programme challenged participant's perspectives through exposure to different worldviews and realities. The disorienting dilemma, identified as the prerequisite to transformative learning then moves individual's into a process of critical reflection where their old meaning perspectives no longer serves the individual in making sense of the present (Hoggan et al., 2017).

### 1.2.2.1. Critical reflection

Critical reflection is a phase in the transformative learning process where an individual's beliefs and assumptions are internally scrutinised which may lead to a modification of existing mental models to bring about new meaning (Mezirow, 1997). The process then fosters greater self-awareness in individuals where there is a transformation in thought patterns, points of view and new meaning frames are learnt to be accommodated (Kayes, 2002). Importantly, critical reflection needs to be differentiated from "reflection" as reflection places emphasis on short-term tasks or complications and critical reflection on assessing implicit assumptions to be more open to alternate ways of thinking and different behaviours (Matsuo, 2019). Critical reflection thus facilitates a process that changes the structures of ones interpretation of the world and ones assumptions which supports the transformative learning process (Mezirow, 1997, 2000). Through critical reflection one becomes cognisant

of obsolete beliefs and behaviours that may need to be eliminated thus having a positive influence on unlearning (Matsuo, 2019).

A number of scholars have argued that social relationships are a crucial consideration in the reflection process as individuals exist in a broader social context where meaning perspectives are accumulated from these relations (Hoggan et al., 2017; Mälkki, 2010). Hoggan et al. (Hoggan et al., 2017) further argued that a disorienting dilemma may occur due to the tensions that occur from the norms and expectations placed on an individual by community, family or organisation which could trigger an individual to change. Individuals may also resist the shift in perspective depending on how much the person values the relationship in fear of compromising the social relationship (Mälkki, 2010). The process of critical which could trigger emotions such as fear, guilt, anger or shame (Mezirow, 1990) It is not always an easy process and transitioning to the next phase may be resisted.

One of the learning processes in SoY involves reflective learning where learners are encouraged to delve into reflective questions based on their interactions, learnings and experiences of the programme. This allows them to internally examine their thoughts to make meaning of their experiences relating to themselves, others, and the context to which they are exposed (Spooner, 2019). These reflections are also stimulated by group discussion, a form of rational dialogue where facilitators and peers challenge the worldview or meaning attached to experiences. This, according to Mezirow and Taylor (2009), stimulates scrutiny in the learner's mind who then reflects on previously held interpretations of experience. Furthermore, the critical reflection process has the power to change or replace beliefs and routines making individuals more open to learn and adopt new ways of thinking, knowing and doing (Matsuo, 2019).

### 1.2.2.1. Rational dialogue

Rational dialogue is the next component of the transformative learning process. According to Mezirow (1997), this requires individuals to be open-minded and unbiased in presenting their views where judgement needs to be suspended when engaging with the assumptions of others. It encompasses discourse about personal values, social beliefs and assumptions that should be practiced in an objective and rational manner (Mezirow, 1997). The process of dialogue is also referred to as a

mutually beneficial learning through communication between and across diverse self-worlds (Boström et al., 2018). Boström et al. (2018) argued that diverse knowledge systems serve as a catalyst to ensuring adaptability of human societies which allows people to acknowledge the limits of their own knowledge worlds, and has the potential to effect meaningful societal change. It is thus stated that learning is social and mutual which is only made possible if opportunities to learn from diversity is offered and organised by institutional arrangements (Boström et al., 2018). Furthermore, it has been argued that learning is rooted in social interactions making it complex in nature (Cranton, 2012). These interactions shape understanding and knowledge where the process allows for patterns of understanding to be intertwined and meaning thus collectively co-created to form a more nuanced perception of reality (Longmore, Grant, & Golnaraghi, 2018).

In SoY, dialogue forms another critical component of the learning process. The specific practice of dialogue within the programme includes four important practices, namely, listening, respecting, voicing and suspending judgement (Spooner, 2019). These practices require an inner stilling of assumptions, opinions, perceptions and thoughts to understand new ways of thinking, allowing in different perspectives that will foster a deeper meaning and understanding of the other. Social and mutual learning is able to take place between a diverse group of peers and other engagements which has been an intentional design of the programme - allowing for communication and cross-fertilization of divergent knowledge worlds, thus aiding positive learning and a network for positive societal impact.

### 1.2.3. The outcomes of transformative learning

Perspective transformation is the key outcome of transformative learning which involves greater self-awareness, broadened perspective, expansion or shift in worldview and behaviour change through action (Mezirow, 2000). These outcomes have however been critiqued by scholars due to its vague and inadequately explained nature of perspective transformation including insufficient evidence of behavioural change as a result of this transformation (Hoggan, 2016a; Taylor, 2008).

A variety of other learning outcomes evident in the way in which people change has since been described by scholars as examples of transformative learning. A typology created by an empirical study by Hoggan (2016b) includes three broad categories,

namely, a change in worldview; a shift in sense of self; critical ways of knowing (epistemology);  difference in the way one exists in the world (ontology); change in behaviour through action; and enhanced capacity as evidenced by systemic qualitative change in the ability to see, interpret and function in the world. These outcomes are similar to the outcomes experienced by SoY past participants in this study. Participants reported developing a better understanding of self, a shift in worldview and a sense of agency, amongst others.

By ridding oneself of obsolete beliefs, knowledge and behaviours, there is potential for personal and organisational growth as these old frames of reference and habits often blocks people off to new and empowering learning (Matsuo, 2019). Matsuo (2019) therefore posits that replacing or updating historic ways of thinking and doing with new ones through generative exploration and learning as a crucial skill to survive and even thrive in today's turbulent environment.

In addition, it  has been argued that individuals will face moral choices and that these decisions are what will ultimately have an impact on societal wellbeing (Caldwell et al., 2013). Therefore, transformative learning seeks to improve individual capability to create value in organisations, while at the same time being accountable to the duties owed to its stakeholders (Caldwell et al., 2013). This links to the idea that SoY past participants, as a result of their transformative experience has a significant positive impact on their personal growth, their organisations as they became much more engaged citizens.

## 1.3. Leadership theories and models

It has been argued that despite great effort by business schools to develop good leadership, that students who enter the working world across sectors continues to display unsatisfactory progress in terms of broader knowledge systems and responsible leadership behaviours and actions, including social responsibility (Byrne, Crossan, & Seijts, 2018).  SoY is a youth leadership programme offered by a business school to cultivate such leadership. It has objectives organised into three broad themes, namely, personal development, deepening understanding of socio-economic issues, and the development of knowledge and skills to voice and action a vision of a more inclusive and just South Africa. This section discusses leadership theories that related to the study which emerged from the data when exploring the

understanding of leadership brought about through the transformative learning experience of SoY past participants.

Literature on leadership was reviewed in order to make sense of the field especially as it related to the findings of the study. As leadership was the intended outcome of the programme, it was useful to gain the reflections on the effect that participation in SoY had on past participants and how this may have informed their understanding of leadership. Three theories have been broadly discussed in terms of its definition and relevance to the findings of this study, namely contextual leadership, responsible leadership and inclusive leadership. These have been selected based on aspects that link to the findings of research question 3 and 4 which include leading self and others; the relevance of context; and the broader agenda of inclusion and societal responsibilities of leaders.

### 1.3.1. Contextual Leadership

SoY is a leadership programme that has been established in a certain context - South Africa with many social and economic challenges that continue to prevail post-apartheid. Context has become an important consideration in the field of leadership due to the impact it has on leadership behaviours and outcomes (Porter & McLaughlin, 2006). The construct of contextual intelligence is defined as "the ability to recognize and diagnose the plethora of contextual factors inherent in an event or circumstance, then intentionally and intuitively adjusting behaviour in order to exert influence in that context" (Kutz, 2008, p. 18). Kutz (2008, p. 18) further emphasised that it requires three abilities, namely, "an intuitive grasp of relevant past events; acute awareness of present contextual variables; and awareness of the preferred future". It has been suggested that leadership is highly dependent on context and socially constructed where leaders and organisations are deeply embedded in its context (Osborn, Hunt, & Jauch, 2002).

Contextual leadership is not limited to a top down influence relationship but rather a dynamic relationships of networks that requires active dialogue across all levels for collective influence of leaders on the system (Osborn et al., 2002). Leaders in South Africa thus have a broader social and political context to consider in addition to organisation's contextual factors that will impact their leadership. Burak (2018, p. 230) further emphasised that "contextual factors such as national culture, institutional forces, the sex composition of groups, the economic conditions of countries and

organisations, and crises affect the leadership process and leadership outcomes". SoY provides a platform for participants to critically engage on contextual issues in South Africa which creates an awareness of the relevance of past events on current systemic realities and develops the agency needed for critical engagement in the creation of a better future reality.

The diverse nature of the South African societies is a significant factor for leaders to consider which according to Collinson and Tourish (2015), has a significant effect on the impact and limitations of leadership. If embraced, demographic diversity has the potential for positive impact on organisational performance through the development of meaningful and valued relationships (Burak, 2018). The economic, social or political environment also transform the way in which business operates as well as the intersection of inequalities such as race, class, gender, amongst others (Collinson & Tourish, 2015). It is therefore critical for students to understand and acknowledge how context shapes leadership practices and similar to SoY, the diversity of meaning brought into a classroom brings about a new understanding of the dynamic of leadership and followership (Collinson & Tourish, 2015). SoY is designed in a way that participants gather perspectives and understanding from diverse points of view which challenges their meaning perspectives.

### 1.3.2. Responsible Leadership

Another leadership theory has been explored in relation to SoY is the concept of "Responsible Leadership (RL)". It is suggested by scholars that responsibility is neglected in other more established leaderships theories which according to Maak and Pless (2011) should be at the essence of being an effective leader. There is an increasing need for leaders to not only add and create value for their stakeholders, but who also play an active role in shared responsibility in addressing societal problems (Pless & Maak, 2011). The construct of responsible leadership therefore incorporates ethics and social responsibility into leadership studies (Lips-Wiersma, Haar, & Wright, 2018). Siegel (2014) argued that there has been a lack of emphasis between the role of leaders in social responsibility initiatives, however, it is important to also understand one's own values and biases and how this relates to being accountable to various stakeholder groups. In the African context, Ntseane (2011) suggested that social change is a shared responsibility where development and

understanding acquired through transformative learning becomes crucial for this change.

Maak and Pless (2006) emphasised that leaders face a global, interconnected, complex, and uncertain business landscape, which calls on leaders to have a purpose and guiding vision shared with the people they lead. It is further suggested that an organisation's core purpose and vision is what inspires followers which creates commitment when characterized by values that speak to the needs of multiple stakeholders (Waldman & Galvin, 2008). Maak and Pless (2006, p. 103), define responsible leadership as "a relational and ethical phenomenon, which occurs in social processes of interaction with those who affect or are affected by leadership and have a stake in the purpose and vision of the leadership relationship." This suggests that relationships are at the core of leadership where the inclusion of various stakeholder groups is developed and cultivated through ethically sound relationships based on the premise of an interconnected stakeholder society (Pless & Maak, 2011). The responsible leadership domain may then incorporate personal influences such as value and ethical decision-making; organisational leadership linked to corporate social responsibility; while being aware of the societal and cultural context such as collectivism and humanism as it relates to social concerns (Pless & Maak, 2011). The construct has relevance to other leadership theories, namely, ethical, authentic, transformational an servant leadership in that they are all value-centred and not necessarily leader-centred (Lips-Wiersma et al., 2018; Pless & Maak, 2011). Shared leadership has also been added as an element of RL which includes self-determination and empowerment along with not being a leader-centred approach (Lips-Wiersma et al., 2018). A more comprehensive definition is offered as "the art of building and sustaining social and moral relationships between business leaders and different stakeholders (followers), based on a sense of justice, a sense of recognition, a sense of care, and a sense of accountability for a wide range of economic, ecological, social, political, and human responsibilities" (Pless, 2007, p. 451).

Further to this, it is positioned as a people-centred concept where Hymavathi, Kasarabad and Avadhanam (2015) argued that RL needs to be driven by organisational leaders with courage and respect for both internal and external stakeholders. Furthermore, it was argued that the social responsibility is fundamentally a leadership challenge which according to Mousa and Puhakka (2019)

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necessitates leadership qualities such as care, moral conscious and openness towards all stakeholders with a deep awareness and understanding of the role that business ought to play in society. Due to the emphasis on the relational aspect of leadership, RL is premised on the notion that leaders have a responsibility to multiple stakeholders groupings, therefore grounded in stakeholder theory (Cameron, 2011). This network and non-hierarchical approach involves stakeholders across multiple internal and external cultures which must be rooted in firm ethical and normative practice and considerations (Miska & Mendenhall, 2018). Multiple roles are linked to being a responsible leader, namely "architect, change agent, citizen, coach, networker, servant, storyteller, steward and visionary (Maak & Pless, 2006, p. 107). Accordingly, RL requires managing across multiple contexts and is a balancing act of managing external pressures of competing stakeholder interest with personal inner contentions of leading consistently with integrity (Miska & Mendenhall, 2018). This is in essence a notion of being good and doing good through responsible behaviours (Cameron, 2011).

Not enough is being done from a management learning perspective to incorporate sustainability and ethics into management education as research shows that this area of leadership development still shows inadequate results (Pirson, 2020). According to Waddock (2018), this requires a fundamental shift in paradigm through an introduction of new narratives. It is therefore argued that leaders need to unlearn, and inquire deeper understanding beyond the dominant economistic narrative towards a more humanistic narrative (Pirson, 2020). In his latest research, Pirson (2020) proposed that this kind of managerial learning needs to be a co-created process with multiple diverse stakeholders to ensure stakeholder dignity, thus contributing to the common good.

Since SoY aims to cultivate a sense of leadership responsibility through the programme, particularly in the South African context, RL provided a useful framework for understanding its utility in leadership practice that speaks to addressing the challenges and issues facing business leaders and society as a whole. This requires a shift from a traditional economist or opportunity-seeker approach to a more integrative leadership orientation where there is a responsibility to a range of stakeholders as part of this interconnected world (Pless, Maak, & Waldman, 2012). This can be achieved through principle-driven contributions to human rights issues,

optimising value across social, economic and environmental spheres as well as genuine consideration and interests and wellbeing of all stakeholder groups (Pless et al., 2012). This distinction from a purely economic value orientation is perceived as a balanced and sustainable value to business and society, which Pless et al., (2012) emphasise as "the right thing to do" as responsible leaders. Such leaders are driven by a sense of purpose, driving value creation for business stakeholders and society which incorporate rational, analytical as well as the emotions concerned with its stakeholders. There is thus a continued quest for responsible leaders who are able to ethically deal with the leadership challenges faced in an interconnected and complex world while at the same time taking up an active citizenry role in addressing the most urgent societal problems (Pless, Maak, & Stahl, 2011).

Participants in the sample spoke to the care and wellbeing of a broad range of people within and beyond their immediate work environment, linking closely to the characteristics of responsible leadership.

### 1.3.3. Inclusive Leadership

Given the leadership orientation of SoY developed a cognition and orientation towards inclusion, it was also important to explore aspects of inclusive leadership as it related to the programme and potential leadership learnings of SoY alumni. Bourke and Espedido (2020) argued that inclusion starts with leaders where 70% of leader's messaging and actions contributing directly to whether or not individuals feel included. Inclusive leadership traits comprise "visible commitment; humility; awareness of bias; curiosity about others; cultural intelligence and effective collaboration" (Bourke & Espedido, 2020, p. 3).

It is further added that diversity be embraced by not only changing the composition of the workforce, but the need for organisations to truly integrate a diverse group of employees at all levels of the organisation in a way that they feel like they belong and valued in the organisation (Burrell & Rahim, 2018). This requires an understanding of the "other" and the complexity of diverse identities that people recognise themselves as. Further to this is the requirement for leaders to understand the systems that privilege a particular group over another and the conflicting views on issues of social justice and equality initiatives (Burrell & Rahim, 2018).

Due to the history of the country, individuals may not realise their own biases and how their action may leave the "other" feeling alienated or devalued in the organisations. Burrell and Rahim (2018) suggested that historic perspectives tend to manifest in the way people interact with each other and without diversity and inclusion being in the leadership culture, values, and strategic vision or the organisation, these manifestations lead to individuals never feeling truly embraced or valued in the organisation (Burrell & Rahim, 2018). Since leaders play such a significant role in developing the vision and culture of an organisation, it becomes crucial for leaders to have an awareness of their own biases and how their actions affect true feelings of inclusion in an organisation.

One of the most important traits of inclusive leadership according to Bourke and Espedido (2020) includes a visible commitment of leaders to make diversity and inclusion a priority and to hold themselves and others accountable. In addition, a leader's awareness of personal and organisational bias is rated highly as a significant trait (Bourke & Espedido, 2020). A willingness to learn about one's biases together with humility, empathy and perspective taking are noted as key behaviours that make people feel safe to give their honest feedback and a feeling that leaders take into account their viewpoints with care - this also creates personal connection between leaders and their diverse set of stakeholder followers, making it easier to execute a shared purpose (Bourke & Espedido, 2020).

This broad overview of inclusive leadership speaks to some of the outcomes and learning of SoY where awareness, empathy and perspective taking were critical behavioural shifts that will serves them well in an organisational context. Bourke and Espedido (2020) emphasised awareness as a crucial element to personal development which together with humility and empathy can make people feel much for included in an organisational context.

## 1.4.    Conclusion

Mezirow's transformative learning (1997) work posits that transformative learning encourages deep questioning of one's mental models and assumptions, which goes beyond content knowledge, and is a process that empowers individuals to learn by freeing themselves of incomplete and unexamined frames of reference that obstruct effective judgement and action.

Furthermore, the process of transformative learning would lead to an individual being more inclusive, open and receptive of perspectives making them more capable of change as a socially responsible decision-maker (Mezirow, 2000). From a leadership perspective, traits of being more aware of context, responsible and inclusive are particularly valuable in a context of vast separation between diverse socio-economic and socio-cultural worlds contributing to the discussion of how individual transformation can translate to broader social change and inclusion.

## 2. RESEARCH METHODOLOGY

### 2.1. Introduction

This chapter outlines the research methodology and design adopted for this study, as well as the rationale for selecting the methodology and design for the study. The population, unit of analysis, data collection tool, the data gathering process and analysis are outlined and discussed followed by quality controls and limitations to the study.

### 2.2. Research Methodology and Design

The research methodology adopted for this study was a qualitative design and took an explorative approach using case study research. Zikmund (2000) suggests that qualitative, exploratory research is appropriate when there is a new or unexplained phenomenon within a chosen field of study, which requires further exploration and new insights. Furthermore, qualitative research addresses business research that facilitates the discovery of true inner meanings which provides the researcher with an opportunity to offer elaborate interpretations of the phenomena (Zikmund, Babin, Carr, & Griffin, 2010). In addition to the study being exploratory in nature, a case study research strategy was chosen as the study aimed to build on existing theory by investigating a phenomenon that has not been adequately explained by existing theory (Goffin, Åhlström, Bianchi, & Richtnér, 2019).

This method and strategy of research was deemed appropriate to the study as the purpose was to explore the complexity of learning experienced by SoY participants and what this may have meant for their leadership. The study sought to understand the nature of the learning experienced by past participants of the SoY programme through the lens of the transformative learning theory, and aimed to understand the relevance of this learning some years after their participation in the programme and

within the broader context of participants' organisational leadership within the South African context. This context is described as one that continues to grapple with deep rooted post-apartheid issues of division and mistrust. South Africa is a country that contents with transforming the entire country due to its history of institutionalised racism and sexism which continues to exclude many previously oppressed individuals (Nkomo, 2015).

An interpretivist approach was adopted which allowed the researcher to get a deeper understanding through the subjects' perceptions by studying the social phenomenon in their natural environment (Guba & Lincoln, 1994). This approach relies on the interpretation of data by the researcher involving a set of beliefs that informs the researcher's understanding of reality (Denzin & Lincoln, 2008; Schweber, 2015). This approach was appropriate as the intention was to understand the social phenomenon and learning experienced of past participants as a consequence of a transformative learning experience. It further sought to understand how this may have informed their understanding of leadership of past participants within organisations some years after the intervention where data was interpreted by the researcher to explain the social phenomenon. Furthermore, Makhenzie and Knipe (2006) describes interpretivism as understanding the human experience, which was the intention of the research - to understand the human experiences and learnings about leadership of past participants of the SoY programme which was analysed through a transformative learning lens.

The research study then took an inductive approach to theory development to a phenomenon that is not adequately explained or limited in nature (Glaser & Strauss, 2009). The inductive reasoning approach is defined as "the logical process of establishing a general proposition on the basis of observation of particular facts" (Zikmund et al., 2010, p. 44). According to Patton (2002), this approach allows for potential patterns to emerge that lead to the formulation of a general theory. Furthermore, inductive qualitative research serves a primary purpose to learn directly from the subjects about what is considered to be significant and important in that particular context (Pratt, Kaplan, & Whittington, 2020). The researcher therefore sought to understand the experiences of SoY past participants based on multiple perspectives and realities of the subjects to develop theory to an inadequately explained phenomenon.

The technique used to collect data was semi-structured interviews which aligned to the interpretivist philosophy (Creswell & Creswell, 2017). Semi-structured interviews allowed the researcher to ask a set of themed and planned out questions that can be flexible in order allowing further exploration on points of interest depending on the interviewee's responses. (Saunders & Lewis, 2018). This technique was appropriate as it allowed the researcher to explore the phenomenon of the learning experienced of past participants in an in-depth way that allowed for verification of understanding of the participants responses to the interview questions. This technique further allowed the researcher to probe for deeper understanding and to address specific issues that needed further inquiry  (Zikmund et al., 2010).

As previously stated, the strategy selected for this study followed a case study approach which according to Creswell, Hanson and Clark (2007) involves studying an issue through one or more cases within a certain setting or context. The study therefore explored a case, within a single bounded system (Creswell et al., 2007) where the single bounded system was the SoY programme. Case studies can further be referred to "as the documented history of a particular person, group, organization, or event" (Zikmund et al., 2010, p. 140). This strategy provided multiple perspectives to the research questions, providing the researcher with a detailed understanding of the context of the research (Saunders & Lewis, 2018). Due to the intent of the study, a single intrinsic case study design was used, as the focus of the study was on the case itself, the SoY programme. According to Creswell et al. (2007), an intrinsic case presents a unique or uncommon situation with the intention of understanding the case itself, as opposed to an instrumental case study which focuses on a particular issue. The SoY programme is considered to be unique in that it is a nonformal youth leadership programme offered at a business school, an institution that focusses on formal, adult education offerings, and the researcher had an intention to understand this unique case itself.

## 2.3.    Population

Saunders and Lewis (2018) describes a population as all the members of the group set. The population identified as relevant to this study was all individuals who participated in the SoY programme.  This population was selected due to their experience participating in the programme. Further to this, the population criteria included individuals who have work experience within a South African organisation,

which assumes that they would be able provide useful insights on leadership in a context described as structurally divided and to an large extent non-inclusive (Nkomo, 2015). It has argued that effective leadership is key to addressing the transformational issues which is concerned with issues of representation, identity, agency, and resistance (Nkomo, 2011). This allowed the researcher to ask questions related to leadership and their perspectives on the response to societal issues in South Africa as leaders today.

## 2.4.  Sampling method and size

The sampling method used was non-probability purposive sampling. According to Zikmund et al. (2010), non-probability sampling allows the researcher to rely on judgement for various reasons with purposive sampling similarly involving the use of judgement to choose specific respondents with particular characteristic best suited to answer the research questions and objectives (Morse, 2004).

For this study the sample was a demographically diverse group of individuals who participated in the SoY programme in terms of gender, race, socio-economic background and schooling background were selected.  As the study was qualitative in nature, a small sample of 14 respondents were selected, regardless of the sector they work in as the researcher to sought to obtain perspectives from a diverse sample who have insights on leadership in various settings. 12 respondents had between two - eight years management experience, with two respondent having less than six months working experience. Due to the multiple dimensions offered by the sample, these individuals were able to provide rich insights providing the researcher with a range of views and experiences from respondents best suited to contribute to the research questions and objectives of the study. Insights were shared based on their personal experience on SoY and how this influenced their understanding of leadership after completing the programme.

Although 14 individuals were interviewed from SoY year's 2005 - 2013, respondent 13 and 14 were not included in the study. It was discovered in the interview that respondent 14 did not have any work experience and therefore did not meet the sampling criteria. Respondent 13 met the criteria of the sample; however, the interview was unfortunately not recorded and could subsequently not be analysed.

Appendix A depicts the description of the interviews included in the research sample. Respondents not included in the study are marked with an asterisk.

## 2.5. Unit of analysis

The unit of analysis in this study were the individuals that were interviewed, and the level of analysis was the SoY programme. The unit of analysis may refer to who the researcher will obtain data from at a certain level of aggregation (Zikmund et al., 2010). This allowed the researcher to gain data from individuals based on the objective of the research study. The respondents shared their experiences which spoke to the process and outcome of the transformative learning theory and how the SoY programme informed their understanding of leadership as a consequence of their experience on the programme.

## 2.6. Data Collection Tool

The researcher used semi-structured interviews to gather data from the purposive sample which represented a diverse demographic of past participants. This provided the researcher with multiple perspectives and detailed descriptions of the phenomenon. This was important as the researcher sought to obtain data about the SoY learning experience from a range of views. The semi-structured nature of the interviews was used as this "encourages participants to tell stories from their own perspectives" (Saunders & Lewis, 2018, p. 158). The structure, design and purpose of open-ended questions provided the researcher with flexibility to ask questions that were not leading, in any order, and was used only as a guide which allowed new insights to be discovered (Saunders & Lewis, 2018).

An interview discussion guide was developed where interview questions were used as a guide for each interview. The questions included in the interview discussion guide were built around learning and leadership informed by existing literature, past participant programme evaluations and program reports. A signed permission letter to these evaluations was sourced by GIBS and is included as Appendix B. The simple nature of the design ensured open dialogue and conversation around relevant subject matter while providing the researcher with the flexibility to probe on specific issues (Zikmund et al., 2010).

The researcher made sure to obtain adequate information about the individual in terms of their schooling background, current position, working and management experience, highest qualification, as well as the year they in which they participated in the programme, prior to delving into the research questions.

Question in the interview guide were focused on nature of the learning in relation to the transformative learning theory; participants understanding of the broader South African context as a result of this learning; what they learnt about leadership and their own leadership in this context; and their understanding and response to social issues as leaders after their experience.

**Table 1: Interview Discussion Guide**

| RESEARCH QUESTIONS | INTERVIEW QUESTIONS |
|---|---|
| **Research Question 1**<br>What has been the nature of the learning experienced on the SoY programme as it relates to the transformative learning theory? | 1. What about your SoY experience stood out for you?<br>2. What about your engagement with others stood out for you?<br>3. Did the programme have any impact on the worldview (meaning perspective) you held at the time?<br>4. What did you learn about yourself through this experience?<br>5. What did you learn about others through this experience? |
| **Research Question 2**<br>How does the learning in SoY relate to understanding the broader contextual issues that affect your personal and organisational life? | 6. What did you learn about the South African context through this experience?<br>7. What has been the relevance of this learning to your personal life?<br>8. What has been the relevance of this learning to your organisational life? |
| **Research Question 3**<br>How did the learning on the SoY programme influenced your understanding of leadership and your own leadership within the South African context? | 9. How has the learning on the programme affected your understanding of leadership?<br>10. How has the learning on the programme influenced how you show up as a leader?<br>11. How has the learning on the programme influenced your own leadership style?<br>12. How has your learning influenced your perception of type of leadership needed in the South African context? |
| **Research Question 4** | 13. What have you learnt about the role of leaders in broader societal issues? |

| How did the learning experienced on SoY relate to your understanding and response to social issues as a leader? | 14. How has the learning on the programme influenced your response to social issues as a leader? |
|---|---|

## 2.7. Data Gathering Process

Identified individuals were invited to participate in an interview via email explaining the purpose of the research and interview. An informed consent form was attached to the email and sent to each respondent to review and was signed by the respondent prior to the interview to ensure that data was collected ethically (Appendix C).

Once respondents agreed to the interview, an appropriate date and time was set up for the interview which took place via an online meeting platform most convenient for the participant. The researcher sent each respondent a calendar invitation to diarise the date together with a link to a virtual meeting room. Considering Covid-19 lockdown restrictions and general safety guidelines, all interviews were conducted via the virtual meeting platform, Zoom. With the permission of the interviewees, each interview was recorded which was done using the virtual platform's capability.

Brayda and Boyce (2014) emphasised the importance of the interviewer being prepared for the interview by practicing opening and transitions between research questions. As such, the interviewer was adequately prepared and rehearsed the opening, gave detailed description of the research study and its purpose practiced the transition between questions. The researcher also practiced the interview on a friend. Each interview lasted for an average of about 45 minutes. The interview with the longest duration was 68 minutes and the shortest interview lasted 23 minutes long. Initially, the researcher used digital software to transcribe the first three interviews, however later sourced the services of a professional transcriber for the remaining interview recordings. To ensure accuracy, the researcher checked and edited each transcript. Accurate transcripts were then used to analyse the data.

## 2.8. Data Analysis

The qualitative analysis started off with preparing the data which involved collecting appropriate data, becoming familiar with the data and deciding on the unit of analysis (Elo et al., 2014). Recorded and transcribed data were uploaded onto ATLAS.ti for coding and thematic analysis. Welman and Kruger (2003) suggested that the

researcher look for recurring patterns and that these consistent patterns be searched for in an inductive manner, which was the approach adopted by the researcher. This inductive approach involved open coding and creating categories extrapolated from the raw data, as opposed to deductive analyses which involves coding built on a theory-based categorisation matrix (Elo et al., 2014). Codes were generated to sections of the data and units of data were allocated to specific categories (Saunders & Lewis, 2018; Zikmund et al., 2010). This was also fitting due to the explorative nature of the study that was previously unexplored (Glaser & Strauss, 2009).

Using this inductive approach, data was then analysed by identifying appropriate themes based on the insights that emerged from the interviews (Zikmund, Babin, & Griffin, 2013). Thematic analysis is a method used to identify and analyse patterns of themes in qualitative data (Braun & Clarke, 2006). Initially a total of 246 codes were generated which were later reduced to a total of 161 codes after a second round of coding. The codes were then be collated together into categories and developed into potential themes (Zikmund et al., 2010). Analysis of the transcribed data took place continuously which allowed the researcher to track when saturation was reached, which is described as a point when sufficient data is obtained which accounts for all aspects of the phenomenon (Morse, Barrett, Mayan, Olson, & Spiers, 2002). For this study, data saturation was reached after 11 interviews - the point when no new insights or themes emerge (Guest, Bunce, & Johnson, 2006). Themes that emerged from the insights in the interviews were then linked and analysed based on the research questions.

## 2.9.  Quality controls

The criteria used to evaluate measurement was reliability and validity which involves ensuring qualitative rigor and trustworthiness (Morse et al., 2002). "Reliability refers to the trustworthiness of observations or data and validity refers to the trustworthiness of interpretations or conclusions" (Stiles, 1993, p. 601). Reliability is referred to by Zikmund et al. (2013) as accurate representation of the intended concept where the measurement assessment needs to be reliable and accurate. Several verification strategies to ensure reliability and validity were adopted by the researcher to ensure rigor and trustworthiness.

As a measure of quality, it has been proposed that attentive selection of an appropriate sample is chosen with respondents having familiarity and information to share on the research topic (Goffin et al., 2019; Morse et al., 2002). Goffin et al. (2019) further advised that in case study research, articulation of why certain cases were chosen are important to measure quality based on the objective of the study. In this study the researcher clearly emphasised the reason for choosing the sample based on their ability to share insights on their SoY experience and leadership. The researcher ensured that the subject selection was representative of the population and diverse in terms of gender, race and year of completion of the programme. When selecting the sample, specified criteria was applied.

Furthermore, it was also important to explain why case study methodology is suitable to the study (Goffin et al., 2019). The researcher has articulated the appropriateness of the strategy adopted by emphasising that it is exploratory, in a unique context, and seeks to discover new insights in an area that is not adequately explained with the purpose of building on existing theory.

Due to its subjective nature, qualitative research has the risk of interviewer, interpreter and response bias which may have an effect on the interview process and analysis of the data (Zikmund et al., 2013). To ensure reliability and validity, the researcher eliminated observer bias through proper collection and analysis methods to ensure reliable findings (Saunders & Lewis, 2018). Bias was further limited by ensuring that the that all interviews were recorded and transcribed. The researcher also mitigated the influence of potential bias by focusing on the perspectives and insights revealed by the participants during the interview.

It is important that the researcher seek additional information from other data sources and multiple other theories to validate interpretations which provides the researcher with an opportunity for triangulation (Goffin et al., 2019; Stiles, 1993). To increase validity of the research, the researcher examined past participant evaluations and programme reports which served as additional sources to triangulate the data.

Data was also reviewed by the researcher's supervisor to provide a different perspective on the data, serving as peer examination of data which was employed as a strategy to further ensure reliability and validity. This ensured that the data was

reviewed and validated by an external party as an alternative to avoiding researcher bias and also assisted the researcher in identifying richer findings (Goffin et al., 2019).

## 2.10. Limitations

As previously discussed, one of the limitations of qualitative research is that it is subject to bias due to the subjective nature of the research (Saunders & Lewis, 2018; Zikmund et al., 2013). Other limitations to this study included:

- Interviewees completed the programme years prior to the interview and could not always remember certain details with regards to the learning process. It was also considered that interviewees were not always able to ascribe meaning-making to SoY since learning is accumulative, however interviewees were able to recount stories about their SoY experience and the researcher gave greater focus to stories about SoY instead of learning in general.
- The researcher has direct experience working with the programme. Although the researcher is involved in managing the programme currently, the researcher had no prior feedback from respondents in the sample and did not have any connection to the programme in the year's respondents participated in the programme.
- The study was limited to a small group of past participants and cannot be generalized to all past participants. Drawing on the research findings it would be useful for future research to survey a larger group of past participants through a quantitative study to test and verify the findings and determine whether SoY contributed to more socially focused leadership actions.
- Furthermore, transformative learning is a process with ongoing events or experiences that could trigger a change in meaning perspectives. Although this study focused on stories that participants shared about their learning experience, a longitudinal study would be useful to examine the individual's transformation and how this was embedded through transformative learning over time. A longitudinal study on transformative learning will therefore provide additional theoretical evidence to further develop the theory as well as the practice of transformative learning.

## 2.11. Conclusion

This study used a qualitative research design and took an explorative approach using case study research to understand a phenomenon that is not adequately explained. The aim of the study was to understand the nature of the learning experienced by SoY past participant which was analysed through the lens of transformative learning theory; and sought to gain insights on how this may have influenced the leadership of past participants some years after completing the programme. The interpretivist study allowed the researcher to gain rich and detailed insights from a small sample of past participants through semi-structured interviews. Data was analysed inductively to develop themes. Themes were then used to explain the phenomenon using rich description of the transformative learning experienced by past participants as well as some pertinent leadership characteristics that emerged from the data.

## Appendix A: Description of Sample

| Respondent | Gender | Race | Type of School | SoY Year | Highest Qualification | Current position | Years of experience | Duration |
|---|---|---|---|---|---|---|---|---|
| 1 | Female | Black | Public | 2011 | Honours in Chemical Pathology | Researcher Assistant | 1 month work experience | 42 mins |
| 2 | Male | Black | Public | 2006 | Bachelor of Law LLB | Attorney: Senior Associate | 2 years in management | 42 mins |
| 3 | Male | Black | Private | 2005 | BA: General | Independent | 8 years in management | 68 mins |
| 4 | Female | Black | Public | 2008 | Postgraduate Degree in Economic | Lead Publicist & Strategist | 2 years in management | 33 mins |
| 5 | Male | White | Private | 2009 | Business Science | Director | 3 years in management | 42 mins |
| 6 | Male | Indian | Public | 2009 | Master's in Industrial Engineering | Business Manager | 2 years in management | 24 mins |
| 7 | Female | Black | Public | 2008 | Bachelor of Law LLB | Legal Counsel | 4 years in management | 51 mins |
| 8 | Male | Black | Private | 2007 | BA: Marketing Management | Senior Digital Strategist | 5 years in management | 31 mins |
| 9 | Female | Black | Public | 2011 | Medicine | Medical Doctor | 5 months work experience | 37 mins |
| 10 | Male | Black | Public | 2011 | BCOM: Accounting | Senior Accountant | 2 years in management | 46 mins |
| 11 | Male | Black | Public | 2009 | BCOM: Accounting | Private Banker | 6 years in management | 48 mins |
| 12 | Female | Indian | Private | 2008 | Master's in Finance | Executive Market Operations | 7 year in management | 41 mins |
| 13* | Female | Black | Public | 2007 | Master's in Business Administration | Product Analyst | 5 years in management | N/A |
| 14* | Male | Black | Public | 2013 | Electrical Enginerring | Student | None | N/A |

**Appendix B: Signed Permission Letter**

**Gordon
Institute
of Business
Science**
University
of Pretoria

06 August 2020

Dear Research Ethics Committee

Jadey Bosman (16390882), a student of University of Pretoria's Gordon Institute of Business Science has been granted permission to use aggregated student evaluation data of past GIBS Spirit of Youth (SoY) sessions and has permission to approach past SoY participants for the purposes completing her research in partial fulfilment of an MBA.

Parents / guardians of SoY participants have signed a consent form which allows GIBS to use their information for research purposes.

Sincerely

Sharon Clarke
**Executive Director: Deans Office**

**Appendix C: Informed Consent Form**

Dear

I am currently a student at the University of Pretoria's Gordon Institute of Business Science and completing my research in partial fulfilment of an MBA.

I am conducting research to understand your experiences and leadership after completion of a youth transformative learning experience, particularly the GIBS Spirit of Youth Programme (SoY). Our interview is expected to last about an hour and a half where I will ask you to reflect on the nature of the learning on the programme and help me understand how the SoY programme has influenced your leadership in the South African context.

The interview will be recorded and transcribed by a third party to ensure accuracy. Your participation is voluntary, and you can withdraw at any time without penalty. All data will be reported and stored without identifiers.

Should you have any concerns, please contact my research supervisor or me. Our details are provided below:

| **Researcher:** Jadey Bosman | **Research supervisor:** Dr Vivienne Spooner |
|---|---|
| Email: BosmanJa@gibs.co.za | Email: SpoonerV@gibs.co.za |
| Phone: 0839748435 | Phone: 0117714350 |

*Signature of participant:*

_____

*Date: _____*

*Signature of researcher:*

_____

*Date: _____*

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**Appendix 2: Example of JME article**

*Article*

# The Efficiency Challenge: Creating a Transformative Learning Experience in a Principles of Management Course

## Rita A. Durant[1], Donna M. Carlon[2], and Alexis Downs[3]

## Abstract

This article describes the results of the "Efficiency Challenge," a 10-week, Principles of Management course activity that uses reflection and goal setting to help students understand the concept of operational efficiency. With transformative learning theory as a lens, we base our report on 4 years' worth of student reflections regarding their experiences and the evolution of the activity. The students report identifying explicit behaviors and uncovering implicit, unconscious aspects of those behaviors that they then have the opportunity to evaluate and change, if desired. We have also learned that a traditionally mechanistic, linear, causal, and rational approach can be transformed into a more holistic one by systematically introducing new experiences into the learning cycle, especially the link between student-learning-through-experience and empowerment. The goal of this article is twofold: explore the application of transformative learning activities in the

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requiring of ongoing discourse. The Efficiency Challenge, which is described in this article, is that type of experiential learning opportunity.

This assignment in an online Principles of Management class grew out of a desire to offer an experiential learning exercise such that students could practice being more efficient in their day-to-day lives. Such an exercise offers students with little work experience the opportunity to master a typical work initiative: that of becoming more efficient. We ask the students to reflect on their habits to identify areas in which they might be spending too much time or money. Over the course of the semester, the students practice new action steps, track their spending in their chosen area, and write about their progress and results at the end of the semester.

The standardized course objectives ask that the students gain conceptual fluency within the functions of management. We considered how learning how to "manage" their time or money could help the students practice at least the planning and the controlling functions outlined in most principles of management textbooks. Planning is the process of specifying goals, and controlling is the process of "monitoring performance and making necessary changes in a timely manner" (Bateman, Snell, & Konopaske, 2016, p. 7). In the process of completing the Efficiency Challenge, the students practiced planning and controlling. If they could save time or money over the semester, they would gain practical experience in managing while "earning" self-created additional money or time that could lead to their thinking more highly of the required course come course evaluation time. By learning to save their own time or money, they could focus on a desired end state. "Better performance would follow if we could find ways of making course requirements more compelling and meaningful for students," explain Lund Dean and Forniciari (2014, p. 14).

The Efficiency Challenge is a unique management education assignment in which it is appropriate in an introductory management class. Our Challenge is similar to skill-development exercises that others have implemented in the classroom: efficiency and group norming processes (Keleman & Spich, 1984), the Balanced Scorecard (Gumbus, 2005), equipment's role in scientific management's time and motion principles (Richardson & Ford, 2002), and time management skills (Gillespie & Parry, 2009; Whetten & Cameron, 2015).

In an early iteration of the efficiency initiative assignment, students were instructed to develop a plan to save money or time over the course of the semester. Several of them posted to the online discussion board that they had filled out a form directing their bank to deposit a given amount of the paychecks to savings accounts. Yes, that action was "saving money," but was not practicing the actions needed to become more efficient. As we looked further into our textbook for available resources, the discussions typically did not elaborate the *process* of becoming more efficient, but stuck to the *result:* For

Over the subsequent years of assigning the Efficiency Challenge, we have accrued a set of practices that reliably allow some degree of success to the students who follow them. Since the Principles of Management class is required of all college of business students, we based the practices on our course learning objectives:

- To understand how management can benefit by raising awareness of habitual behaviors and providing a framework to practice changing those behaviors through a real-world experience
- To fit the concepts practiced through the enactment of efficiency to the larger practice of management, such as planning
- To provide a chance to practice engaging in the necessary iterations in the managerial control cycle

We, too, learn from the student experiences. One key finding is that over time, the instructor's ability to clearly articulate the processes, outcomes, and context of transformative learning was crucial in creating a valuable learning experience. In the next section, we explore those three elements, followed by an explanation about how transformative learning can be used as an exploratory lens when creating and evaluating in-class experiences. We provide a description, analysis, and discussion of more than 4 years of data regarding the Efficiency Challenge, followed by recommendations concerning how faculty might use such an activity to improve learning.

## Transformative Learning in Theory

Originating in 1978 with the groundbreaking work of Jack Mezirow, transformative learning theory in higher education has grown exponentially, with a multitude of perspectives and applications found in many of the behavioral sciences and, to a lesser extent, in quantitative sciences (Mazen, 2008). He summarized the transformative learning process as a rational one, beginning with a disorienting dilemma, moving through meaning making, and resulting in a transformative insight.

Taylor (2001) expands the notion of transformative learning to include critical reflection that is rationally driven coupled with significant "exploration and resolution of feeling. . . . Meaning structures were altered on a non-conscious level outside the awareness of the individual, without deliberate rational examination of assumptions (critical reflection), either by introspection or by rational discourse with others" (Taylor, 2001, p. 219).

Taylor and Cranton (2013) advocate for a more rigorous depiction of transformative learning in both theory and application. They identify three

suggests that transformational learning can occur through such learning activity highlighted, for example, by changes in student perceptions," said Walker and Molnar (2013, p. 229).

## The Process

The process of transformative learning is an explicit one. According to Cranton and Kasl (2012), the transformative learning process consists of three stages: identity of an experience, analysis of that experience, and change in behavior. The ways of completing these tasks range from the cognitive/ rational to social/relational and artistic/intuitive. The process itself is well bounded, with a clearly identifiable beginning, middle, and end (Dirkx, 2000), incorporates affective learning into the process, asserting that the application of transformative learning often focuses too heavily on the rational and conscious critical reflection and overlooks the role of unconscious thoughts, emotions, and feelings. Taylor (2001) concurs and has taken the position that much of the learning that is actually transformative occurs in implicit memory, "which receives, stores, and recovers outside the conscious awareness of the individual" (p. 218). The process of transformative learning is one of raising awareness of a habit, examining that habit through discourse with others, and changing that habit, if desired (Cranton & Kasl, 2012; Dirkx, 2000; Taylor, 2001). There are many processes that result in a mind-shift, including "critical reflection, experiencing new cultures/roles, exposure to the arts, ideology critique" (Cranton & Kasl, 2012, p. 397).

## The Outcomes

The next element of transformative learning extends beyond the simple change in a habit to encompass a change in beliefs. Thus, outcomes in transformative learning are shifts in consciousness. They are often less concrete than behavior changes, with ill-defined time spans. While the process of transformative learning is deliberate, outcomes are both deliberate (i.e., accomplishing a goal) and unexpected (i.e., unintended consequences that result in shifts in consciousness). These unintended outcomes manifest in changed perspectives or frames of reference that lead to more fundamental changes in behavior.

New interpretations of past experiences result in changed behavior (Mezirow, 1996; Taylor, 2008). One of the outward manifestations of transformative learning is raising awareness of habitual behaviors (Mezirow, 1996). Outcomes require dialogic reflection of past experiences leading to the new interpretations.

implicit assumptions and behaviors that affect the explicit behaviors cited in Activity 1.

*Activity 3: Change in Behavior.* The final activity asks students to report on the end result of the initiative: what they saved, what worked, and what did not work, and, finally, whether in the future they would choose to stay the course, change the goal, or correct their performance. The primary goal of this activity is lasting change through new perspectives on the students' ability to control their spending of time or money.

## The Outcomes

We are, in effect, "panning for gold," used here as a metaphor for looking for evidence that transformative learning can happen in an online Principles of Management course. Because this is a business class, the key outcome is the quantitative calculation of the amount of time or money saved and the simulation of a work experience. Because this class is a management class, another outcome is gaining practice in making decisions as the students develop their projects. And because this class supports transformational learning, a self-reported outcome is feeling different.

As indicated above, these courses were delivered online so student work product consists of postings to the course discussion board. We define success as the degree to which students learn something identifiable about their ability to become more efficient, articulate what that kind of efficiency means in their personal lives, and use the textbook's depictions of the managerial control cycle to state their future intentions with their challenge: not change anything, correct their performance, or revise their standard. Here are some examples of that success as it relates to each of the three objectives that define transformative learning.

> **Objective 1:** To understand how efficiency can be achieved by raising awareness of habitual behaviors through a real-world experience.

One of the outward manifestations of transformative learning is raising awareness of habitual behaviors (Mezirow, 1996). This is evident through the Efficiency Challenge as students do a "double take" when they realize they do not know the extent to which their practices of spending money or time are actually costing them. For instance, students report mindless and expensive eating at fast-food restaurants and other restaurants. A student writes, "In the 2 weeks prior to making the initiative I spent $102.15 on take out and drive

of money to save, and it was extremely easy to do so. I will follow this efficiency initiative and hope to save more in the future.

Additional student responses are provided in Table 1. That table includes individual student responses that exemplify the three objectives. The selection of responses varies as we want to include student initiatives regarding a wide range of topics, including spending money on food, spending time sleeping, spending time playing games, and so on.

For instance, Student 1 demonstrates clear changes in behavior and these changes extend beyond the initial goals. That is, this student identifies one change in Objective 2: saying "no to going out after the movie." In Objective 3, the student clearly has learned that efficiency has benefits: "I am currently very pleased with the strides I have taken." Has this student been transformed? Perhaps the student has been, if "being a bit more consumer savvy" results in a new consciousness about what it means to be a consumer.

Similarly, Student 3 demonstrates clear changes in behavior regarding cutting fast-food expenses. The possibility of transformation is also present as this student extends this behavior to creating good life habits.

Student 8's postings seem to indicate a significant shift in consciousness. The initial posting reads, "I was in a destructive pattern." The second posting reads, "Our philosophy as a family became 'Work before fun'!" [*sic*]. By the third posting this student recognizes that her or his behavior has changed, his or her family's behavior has changed, and she or he knows "how good it feels" to better manage time.

## Discussion

Despite the ongoing debate about the value and relevance of introductory management courses, we are struck by the consistent and revealing descriptions that students give for their transformative learning experiences described in this activity. As with any learning experience, we have some students who learn little through the activity; some who gain knowledge that results in a change in behavior, such as how much money they can save by eating at home; and some whose behavior and perspective did change due to the experience. Based on the definition we are using here, such change is true transformative learning. By definition, transformative learning experiences are intended to have lasting effects on the students. Even though some students may not have a transforming experience, we are satisfied that they witnessed their classmates saving time or money by changing the ways they did things, and so those students may have gained some amount of "social learning" (Bandura, 1977). In our experience, getting the student to the transformative

**Table 1. (continued)**

| Student | Objective 1: To understand how efficiency can be achieved by raising awareness of habitual behaviors through a real-world experience. | Objective 2: To consciously decide to change those behaviors. | Objective 3: To realize the benefits, both short- and long-term, to changing the behaviors. |
|---|---|---|---|
| 3 | My initial estimate based on my typical spending was that I would be able to save approximately $180-$300 over the six week period or roughly $30-$60 per week. . . . By saving all the receipts for the fast food purchased, I determined that I spent $68.32 on fast food and carry out during the initiative, which is a savings of between $112-$232. | I accomplished this by taking a few minutes each night to pack myself a couple of salami sandwiches and a piece of fruit as opposed to spending $6-$7 on KFC on an almost daily basis. | In the future, I plan on trying to continue this initiative, because it is beneficial in a number of ways and it is also a good life habit to eat healthy and spend wisely. However, in the future, I plan on adjusting my strategy slightly in hopes of better improving my potential savings. |
| 4 | I love fast food because the minute you order it, it's done, and I don't have time to deal with preparing my own food or waiting an hour for someone else to prepare it for me.<br> . . . I pay everything with my debit card:<br>Previous<br>TOTAL: $121.03! | Now<br>May 14-June 25 spending:<br>TOTAL: $34.46(SAVED AROUND TRIPLE) | I was craving a hot dog so bad . . . I refreshed my mind and decided instead to cook. Even though it took me 40 minutes to make a delicious meal, it saved me money (Gas, Food amount). It also saved me some not needed calories. |

*(continued)*

**Table 1. (continued)**

| Student | Objective 1: To understand how efficiency can be achieved by raising awareness of habitual behaviors through a real-world experience. | Objective 2: To consciously decide to change those behaviors. | Objective 3: To realize the benefits, both short- and long-term, to changing the behaviors. |
|---|---|---|---|
| 6 | I used 2 to 4 hours a week to play a game called "Farmville" on Facebook . . . I decided to use that time to achieve a set goal of loosing 10 lbs by converting my "Farmville time" into "physical workout time" . . . | I used treadmill and elliptical machine in the gym. In addition, I also went swimming in the our pool and walked in the park with my family . . . | I accomplished my goal. My goal was to lose 10 lbs and I lost 11 lbs. I feel that with the combination of food diet, I would've lost more than 11 lbs. In any case, I am still very happy with the result. For the next term, my schedule will probably be the same as far as work and school. However, I plan to add the food diet, on top of my workout, to my goal. |
| 7 | Through my job as a youth pastor I was constantly driving to meet with youth, different leadership that I have, and other pastors in the vast distances across the Manatee/Sarasota area. My goal was to be more productive with my time by scheduling meetings and appointments according to geographical area and thus save a lot of time, but also an incredible amount of dimes through my savings in fuel. | Based upon these numbers and my actual numbers of what I did over the last few weeks, my total savings were $325.50 which was $102.37 more then what I had anticipated saving, and I had cut out 2,485 miles from my daily driving. | I have learned to accomplished both and have gained ideas that will greatly help me in the future. I discovered that I could save time and money not just in the orange category with my meetings, but in every area of my life. Because I had to keep such a careful track of my miles, I found ways to combine meetings, errands, non-ministry related activities, and routine job demands together in the same geographical area which led to huge savings of time and money over the course of the assignment. |

*(continued)*

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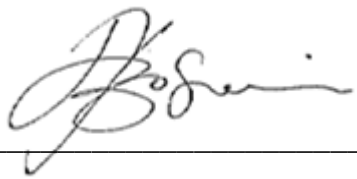
**Appendix 3: Interview Discussion Guide**

| RESEARCH QUESTIONS | INTERVIEW QUESTIONS |
|---|---|
| **Leadership experience** | 15. What is your current position and for how long?<br>16. How long have you been in a leadership position?<br>17. How many direct and indirect reports do you have? |
| **Research Question 1**<br><br>What has been the nature of the learning experienced by past participants on the SoY programme? | 18. What about your SoY experience stood out for you?<br>19. What did you learn about yourself through this experience?<br>20. What did you learn about others through this experience? |
| **Research Question 2**<br><br>In what ways has learning from SoY led to understanding the broader contextual issues that affect your personal and organisational life? | 21. What did you learn about the South African context through this experience?<br>22. What has been the relevance of this learning to your personal life?<br>23. What has been the relevance of this learning to your organisational life? |
| **Research Question 3**<br><br>In what ways did the learning on the SoY programme influence understanding of leadership within the South African context? | 24. How has the learning on the programme affected your understanding of leadership?<br>25. How has your learning influenced your perception of type of the leadership needed in the South African context?<br>26. How has the learning on the programme influence your own leadership style? |
| **Research Question 4**<br><br>In what ways did the learning experienced on SoY relate to understanding and response to social issues as a leader? | 27. What have you learnt about the role of leaders in broader societal issues?<br>28. How has the learning on the programme influenced your response to social issues as a leader? |

**Appendix 4: Plagiarism Declaration Form**

**Declaration**

*I declare that this research project is my own work. It is submitted in partial fulfilment of the requirements for the degree of Master of Business Administration at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.*
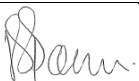
Signed: _____

Jadey Bosman

1 December 2020

## Appendix 5: Copyright Declaration Form

| Student details | | | |
|---|---|---|---|
| Surname: | Bosman | Initials: | JJ |
| Student number: | 16390882 | | |
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| Phone: | 0839748435 | | |

| Qualification details | | | |
|---|---|---|---|
| Degree: | MBA | Year completed: | 2020 |
| Title of research: | Learning to lead through opening up: A business school bridging divides through a transformative youth programme | | |
| Supervisor: | Dr. Vivienne Spooner | | |
| Supervisor email: | SpoonerV@gibs.co.za | | |

**Access**

A.

| | My research is not confidential and may be made available in the GIBS Information Centre and on UPSpace. |
|---|---|

I give permission to display my email address on the UPSpace website

| Yes | | **x** | No | |
|---|---|---|---|---|

B.

| | My research is confidential and may NOT be made available in the GIBS Information Centre nor on UPSpace. |
|---|---|

Please indicate embargo period requested

| Two years | | Please attach a letter of motivation to substantiate your request. Without a letter embargo will not be granted. |
|---|---|---|
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| Signature: | | Date: 1 December 2020 |
|---|---|---|
| Supervisor signature: | | Date: 1 December 2020 |

**Appendix 6: Certification of Additional Support**

I hereby certify that

• **I RECEIVED** additional/outside assistance (i.e. statistical, transcriptional, and/or editorial services) on my research report

If any additional services were retained– please indicate below which:
□ Statistician
**x** Transcriber
**x** Editor
□ Other (please specify:……………………..)

Please provide the name(s) and contact details of all retained:

NAME: Mpho Makamu

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TYPE OF SERVICE: Transcription

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EMAIL ADDRESS: sueswart@gmail.com

CONTACT NUMBER: 082 817 7153

TYPE OF SERVICE: Editor

**I hereby declare that all** *statistical write-ups and thematic interpretations of the results for* **my study were completed by myself without outside assistance**

NAME OF STUDENT: Jadey Bosman

SIGNATURE:

STUDENT NUMBER: 16390882

STUDENT EMAIL ADDRESS: 16390882@mygibs.co.za

## Appendix 7: Ethical Clearance Letter

**Gordon Institute of Business Science**
University of Pretoria

**Ethical Clearance**
**Approved**

Dear Jadey Bosman,

Please be advised that your application for Ethical Clearance has been approved.

You are therefore allowed to continue collecting your data.

We wish you everything of the best for the rest of the project.

Ethical Clearance Form

Kind Regards

This email has been sent from an unmonitored email account. If you have any comments or concerns, please contact the GIBS Research Admin team.